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ABSTRACT

This SPEC (Systems and Procedures Exchange Center) Kit presents the results of a survey of Association of Research Libraries (ARL) member libraries designed to gather data on chat reference service. A total of 66 of 124 ARL member libraries responded to the survey. A copy of the questionnaire with tabulated results is presented. Representative documents include: (1) chat reference on the Web home pages from 12 libraries; (2) policies and guidelines from 11 libraries; (3) training documents from ten libraries; (4) evaluation forms from six libraries; and (5) information on collaborative projects from three libraries. A list of selected resources includes 28 books and articles and 5 Web site addresses. (MES)

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SPEC

Kit 273

Chat Reference

December 2002

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ASSOCIATION OF RESEARCH LIBRARIES
OFFICE OF LEADERSHIP AND MANAGEMENT SERVICES

Chat Reference

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SPEC

Kit 273

Chat Reference
December 2002

Survey

EXECUTIVE SUMMARY 9
SURVEY RESULTS 16
RESPONDING INSTITUTIONS 31

Representative Documents

CHAT REFERENCE ON THE WEB

University of California, Irvine

U C Irvine Libraries home page 36
Ask a Librarian (Reference Services) 37

University of California, Los Angeles

UCLA Library home page 38
Need Help? Ask a Librarian 39

University of Connecticut

University Libraries home page 40
Online Reference Help 41

Cornell University

Gateway to Cornell University Library home page 42
Ask a Librarian 43

University of Florida

George A. Smathers Libraries home page 44
RefeXpress 45
What is RefeXpress? 46

University of Illinois at Urbana-Champaign

Library Gateway 47
UIUC Library Reference Services. Ask a Librarian 48

Louisiana State University
LSU Libraries home page 49
Ask a Librarian 50
Live Assistance 51

University of Massachusetts, Amherst
UMass Amherst Digital Library home page 52
Ask a Librarian 53
UMass Live Help 55

University of Notre Dame
University Libraries of Notre Dame home page 56
Ask a Librarian 57
Ask a Librarian. Live Chat 58

University of Tennessee
University of Tennessee Libraries home page 59
AskUs.Now! 60
Chat Reference Service 61

Virginia Tech
University Libraries home page 62
Online Reference Service: LiveRef and AskUs 63

University of Washington
University Libraries home page 64
Contact the UW Libraries 65
Reference Q&A Live 66

POLICIES AND GUIDELINES
University of Alberta
Ask Us A Question (Chat) 68
Virtual Reference Service 69

Boston Library Consortium
Ask 24/7. FAQ 71

University of California, Irvine
Ask a Librarian. Guidelines 74
Ask a Librarian Privacy Statement 75

University of California, Los Angeles
Digital Reference Guidelines 76
24/7 Reference Privacy Statement 78

University of Florida
RefeXpress. Rules of Conduct 80

University of Illinois at Urbana-Champaign
Ask a Librarian Privacy Policy 81

Louisiana State University
Middleton Virtual Reference Services. Policy 82

Syracuse University
Welcome to LibChat! 84
Reference Services. LibChat Privacy Statement 85

University of Tennessee
About E-mail and Chat Reference Services 86

Washington Research Library Consortium
WRLC Virtual Reference Policies and Guidelines 87

University of Wisconsin–Madison
Libraries Live Help 88

TRAINING

University at Buffalo, SUNY
Welcome to Instant Librarian! 90

University of California, Santa Barbara
Ask a Librarian Live. Basics, Hints, and FAQs 93

University of Illinois at Urbana-Champaign
Virtual Reference Staff Training home page 97

Michigan State University
Chat: Lesson Plans for Training 98

Northwestern University
Reference Librarian Online. LSSI's "Virtual Reference Desk." Training and Practice 107

Ontario Virtual Reference Project
VR Online Manual 108

Syracuse University
LibChat Information 110

Virginia Tech
LiveRef Procedures and Policies—Draft 1 115

Washington Research Library Consortium
Guidelines for WRLC Virtual Reference Librarians 118

University of Wisconsin–Madison
Live Help. Virtual Reference Desk 120

EVALUATION
University of Florida
Evaluation 122

University of Guelph
Virtual Reference: Evaluation Form 123

University of Illinois at Urbana-Champaign
Real Time Reference Survey 128

Louisiana State University
Live Assistance Survey 129

Syracuse University
LibChat User Survey 130

York University
York University Online Reference User Survey 131

COLLABORATIVE PROJECTS
Boston Library Consortium
Ask 24/7 134

Ontario Virtual Reference Project
Ontario Collaborative Virtual Reference Project 135

Washington Research Library Consortium
Ask a Librarian 136

Selected Resources

BOOKS AND ARTICLES 139

WEB SITES 141

SPEC

SURVEY

ASSOCIATION OF RESEARCH LIBRARIES

OFFICE OF LEADERSHIP AND
MANAGEMENT SERVICES

Executive Summary

Introduction

The decline in questions asked at academic library reference desks over the past 10 years is an often-cited phenomenon in reference literature and in discussions among librarians. ARL statistics show that in 2001 the median for reference transactions in member libraries was 105,087, a substantial drop from the 1991 median of 133,022 transactions. Yet total numbers of users remained relatively the same, as the median for student enrollments increased gradually from 18,266 in 1991 to 19,083 in 2001. One generally held opinion as to why reference desk transactions are declining is that users are migrating to rapidly proliferating online information resources. Arguably, users still have information needs that are not being met in the online environment, most notably reference assistance. In answer to this challenge, librarians are working to reposition their services to make them more easily available and effective for remote users who may be working two states away, in a residence hall across campus, or in an office next door to the library. Popular means towards this end have been telephone reference, Web-based instructional aids and tutorials, and the ubiquitous e-mail reference service. Only recently have ARL librarians discovered the utility of chat, or text-based messaging in real-time.

A SPEC survey on chat reference was distributed to the 124 ARL member libraries in July 2002. Sixty-six libraries (53%) responded to the survey. Chat reference was defined for the survey as synchronous or real-time text-based messaging between computer users on the Internet. It is often referred to as "live online reference," "virtual reference," or "digital reference" in articles and discussions. The goals of the survey were to explore the pervasiveness of this new type of service in ARL member libraries and to provide an overview of the technologies being used, usage patterns, and practices in the areas of personnel, policies and procedures, evaluation, and collaboration.

Extent of Chat Reference Service

The survey results indicate that live online reference, or chat reference, is a new and dynamic library service. As of the summer of 2002, only slightly more than half of the respondents (36 or 54%) reported that they offered chat reference service as defined above. All but two of these had been in operation less than two years. Eleven had been in operation for one to two years; sixteen for six months to a year; and seven for less than six months. An examination of ARL member library Web sites in December 2002 revealed that an additional 31 libraries have begun a chat reference service since the survey was distributed.

Not only are ARL libraries adding chat as a medium to extend reference services online at a very rapid rate, but they also are using a variety of software packages and services that are hosted on the vendor's server. "The spectrum of chat software ranges from free or inexpensive software, such as instant messaging or Internet Relay Chat (IRC) that supports text-based conferencing between two or more users, to sophisticated and often expensive software used in call centers that typically combines text-based chat with sound, video, white-boarding, voice over IP (VoIP) and the ability to send users Web pages and files." (Ronan, 2003).

Of the survey respondents that have a chat reference service, 83% use a hosted service. The two most popular are 24/7 Reference and Virtual Reference Toolkit (LSSI), both hosted services. When asked about the relative importance of features in the chat interface, 81% of respondents indicated that easy access for users, or the ability to access chat reference assistance with only a Web browser (unimpeded by downloading and installing software) is of prime importance. The other features considered important are push page technology (69%), which enables the librarian to send a Web page that displays on the user's screen, and co-browsing or escorting (61%) capabilities that automatically send the user the same Web pages the librarian sees. Statistics keeping is deemed important by 61% of respondents, followed by automation of frequently used resources (56%) and system price (56%). Respondents mentioned that vendor support, user familiarity with the software, and control of transcripts are also factors in deciding which chat software package to implement.

Personnel and Work Environment

Staffing

While there is some diversity in how ARL member libraries staff their chat reference services, certain practices dominate. Librarians are the primary service providers in every one of the responding libraries. General reference librarians provide chat reference in 89% of the settings; subject specialists in 72%; and instruction librarians in 44%. Fifteen libraries (42%) also staff their chat service with support staff and ten (28%) use graduate students from library schools. In a small number of libraries, technical services, administrative, and systems staff also participate. Interestingly, only one institution indicated that staff from their consortium provides chat service; the remainder staff their service with local personnel.

Almost an equal number of libraries assign chat duties as part of ongoing reference assignments (25 or 69%) as rely on volunteers (22 or 61%); in eleven libraries both approaches are used. One surprising finding is that chat reference is not a full-time responsibility in any institution. On average, an individual only monitors the chat reference service three hours a week. In the vast majority of responding libraries (27 or 77%), an individual's schedule ranges from one to four hours per week, though eight (23%) report that chat reference staff work six hours or more (up to 12 hours at one location.)

The most popular location for chat reference work is in the staff member's own office (83%), despite the opportunities the medium allows for remote connection. A service desk is a distant second-favorite location (36%). Chat reference personnel telecommute from home or other non-library locations in only eight of the libraries (22%).

Organization and Management

A group approach seems to be the most popular management model. Twelve institutions (33%) have special working groups or teams that manage the day-to-day operations of the chat reference service. These teams have such creative but descriptive monikers as "WebChat Action Team," "Live Ref Team," and "Real-Time Reference Team." Eight respondents (23%) have created special positions such as "Digital Reference Coordinator" or "Interactive Chat Coordinator" to manage the new service. Other institutions have simply added the new responsibilities to those of the head of reference (25%). In several cases, the chat reference service is located in a branch or subject library, in which case, the head of that library manages the service. Regardless of who manages the day-to-day operations, that person (or team) most often reports either to the head of reference services (28%) or an AUL (28%) and in a few cases to both.

Skills and Training

Survey respondents were asked to rate the importance of a range of reference, Web, and computer skills for the staff who are providing chat reference service. Reference interviewing and facility with Web-based information sources are held to be the most important skills. Comfort with computers and the ability to make effective referrals follow closely as other important skills. While respondents indicated that current staff have at least some of the necessary skills, 69% reported that staff require additional training, primarily in use of the specific chat reference software and chatting techniques or "chattiquette." Others mentioned the need for additional training on reference sources and searching the Web.

Service Schedule

Service hours tend to fall within regular library operating hours, with chat reference most commonly available during the Monday through Friday workweek. Very few chat reference services operate on the weekend. Of the thirty-five survey respondents, only nine offer Sunday service; six of these offer Saturday hours. Hours of availability vary from as few as 10 hours a week (approximately 2 hours daily Monday through Thursday) to 100 hours per week (roughly 14 hours a day, seven days a week.) Nine libraries offer up to 20 hours a week; slightly less than half of the institutions (17 or 49%) provide between 21 and 40 hours; six offer 41 to 70 hours; and three offer 71 to 100 hours. No library reports offering 24/7 chat reference services.

The tendency is to vary the service hours during the year, according to the local academic schedule. Only 10 libraries have established a consistent service schedule throughout the year. The majority (25 or 71%) offers service during the regular semesters, slightly fewer offer summer service, and fewer than half offer intersession or holiday service. The libraries that offer the largest number of chat reference service hours tend to be those that vary the schedule from term to term.

Many libraries are experimenting with service hours to arrive at the best schedule for users. Sixty-four percent of the respondents report they have changed the schedule since beginning the service and six are considering a change. In general, the number of days of service or number of hours per day has increased as both demand and the number of volunteers increase. A few libraries have eliminated service during low-use times.

Users and Usage

The survey results indicate that chat reference assistance is offered to a broad range of users. Graduate students and faculty are eligible users at 83% of the responding libraries, undergraduates and staff of the parent institutions are eligible at 81%. An impressive finding is that 23 or 64% of the institutions offer reference service to anyone who logs on and asks a question. Two libraries qualified this policy, saying that queries from outside users must relate to their institution or a unique collection in their library. Forty-two percent of the respondents provide online help to their surrounding communities. As one respondent put it, "Users are anonymous, but service is open to all."

The most frequent users of chat reference are undergraduate students, a finding that will not surprise readers of the recent National Telecommunications and Information Administration report, *A Nation Online: How Americans Are Expanding Their Use Of The Internet* <http://www.ntia.doc.gov/ntiahome/dn/index.html>. One librarian commented that use seems proportional to the size of the group and that "undergrads use it most, but they are also our most numerous group of users." Perhaps these are the patrons observed using chat reference at computers in 69% of the responding libraries, instead of using traditional reference desk service.

Graduate students are the next largest category of users followed distantly by the world at large. Faculty has used the service at only three libraries and, while patrons from fellow members of a library consortium are eligible at 14 institutions, none of these are yet reported as users. This may change as several respondents report that they are preparing to begin consortial service.

The most frequently asked questions are about library services and institution-held e-resources, followed by questions about library collections, then connectivity or access to online resources. Less frequently asked are in-depth research questions, questions on using Web resources, and basic factual questions.

Policies and Procedures

Survey respondents were asked to submit documents that provide information about the service for users and describe policies and procedures. An examination of these documents reveals that many of the libraries have established specific policies and procedures that not only govern operation of the service, but also define how chat integrates with other information and reference services and how it is unique. These policy statements are generally provided on, or linked to from, the introductory chat reference Web page. Typically, these statements include the following components.

What the service is, when it is offered, and how to access it.

Kinds of questions that are appropriate for the service. Some libraries state that requests for certain library services (e.g., circulation or interlibrary loan actions) are not appropriate for this service or they recommend that the user review the library's FAQ page before asking a question. Several libraries state that chat is most appropriate for short-answer questions.

Resources used. Electronic resources are obviously the preferred method for answering questions in the virtual reference environment. Access to a proprietary electronic resource may be limited to chat patrons who are primary clientele, though, if the license prohibits remote access by non-primary clientele.

Privacy policy. While transcripts of chat sessions can be extraordinarily valuable training and service evaluation tools, their availability raises privacy issues for both patrons and staff. Library patrons may be concerned about the confidentiality of their personal information and research interests. Library staff may be concerned about how chat transcripts will be used for evaluating their reference service performance. The USA PATRIOT Act and other recent security-related legislation have heightened awareness about the need for a policy that addresses the retention of and access to session transcripts, as well as other patron transaction records. Libraries are responding by establishing and making available privacy policies for both users and staff.

Libraries are also developing procedures that prescribe chat reference operations. Some of these are mechanical—how to log on, set up a session, and log off. Others relate to how the service is delivered and the unique aspects of chat. These procedures include, for example:

Development and use of scripted messages;
How to transfer patrons and make referrals;
How to communicate in chat mode—quickly, frequently, and briefly so the patron knows the session is active;
How to use appropriate etiquette in the chat environment.

Publicity

Since chat reference is delivered electronically, prominent display on the library Web page and easy identification of the service are probably the most fundamental promotional tools. Nearly all the responding libraries (32 or 89%) report that the service is highlighted on their library Web page and all but one indicated that a link to the service is provided on the top or second-level page. Many libraries feature "Ask A Librarian" or similar phrases on their top page. In addition, some libraries work closely with the university's Web portal and/or course management portal to provide access to the service. Most respondents (30 or 83%) promote their service in bibliographic instruction sessions. The majority also use library newsletters, local papers, university newsletters, student newspapers, correspondence with users, and announcements on electronic mailing lists as promotional tools. Posters, flyers, and bookmarks were frequently mentioned as other approaches. Some specific promotional efforts include "do not disturb" door hangers, t-shirts, candy, computer monitor calendar strips, and cafeteria table toppers. Other promotion venues include campus orientation sessions, admissions materials, and alumni associations.

Evaluation

The newness of chat reference is reflected in the area of evaluation. Several respondents commented that evaluation is being planned or that they are analyzing transcripts to evaluate service effectiveness. All but one of the responding libraries track the number of chat reference transactions.

Twenty-one (58%) ask users to fill out a Web survey. A small number conduct focus groups or interview users periodically.

The very nature of chat reference makes it possible to evaluate the quality of reference service in ways never before possible. Transcripts of sessions can be used to assess how well staff members understand patron information needs and conduct the reference interview, how accurately they answer questions, and how effectively they select information to meet the patron's level and depth of need. Consequently, transcripts can be used very effectively to identify problems—general and individual-specific—and to develop case studies and training tools. Furthermore, statistics generated by the system produce a great deal of information that can be used for evaluation. One respondent reports, "Each session becomes a tangible artifact that is invaluable for studying user and reference staff behaviour, the research process, and resource usage. Some of the statistics we are generating from each transaction include:

- What page the patron was on when they needed help
- What time the patron came in
- How long they waited until they were picked up by the library staff
- Most popular hour, day of week
- IP address of patron (i.e., on/off campus)

Web statistics tell us:

- How many times our entry pages were hit
- Most popular hour, day of week
- Browsers used"

While transcripts and user surveys make it possible to evaluate chat reference more effectively than traditional reference and other library services, survey respondents are not satisfied with their libraries' performance in the area of chat reference evaluation, yet. Respondents were asked to indicate their impressions about the quality of four aspects of their chat reference service: ease of use of the service, number of service hours, accuracy of answers, and evaluating the service. After indicating their expectations for the minimum level and desired level of service on a scale of 1 to 9, they were asked to rate their perception of their library's actual performance level. On average, the respondents have fairly high expectations for both the minimal and desired performance levels. (Accuracy and ease of use are somewhat more important than evaluation and number of hours.) Regardless, they did not give themselves high marks when asked to assess their own library's performance in these areas. As a group, the responding libraries rate their actual performance as below the minimum performance level in all four categories with the largest gap in the area of evaluation. Perhaps as chat reference services mature, the "adequacy gaps" between the desired and actual performance levels will disappear for all these categories.

Survey Follow-up Questions

Analysis of the survey data raised new questions for the investigators. To find answers, they contacted the 36 survey respondents who offer chat reference service and checked ARL member library Web sites to gather additional information. Below are statistics on use of chat reference services, information about preferred chat reference software, and a brief description of collaborative chat reference projects.

Chat Reference Usage Statistics, 2002

It is difficult to collect chat reference usage statistics at this time. Many institutions are just starting chat services and others are still devising means to count transactions. Some libraries use software packages such as AOL Instant Messenger that do not automatically count transactions. Other libraries switched vendors or chat software packages midyear. The following chat reference usage statistics were supplied by 10 of the 36 ARL libraries that responded to the original survey. Each has granted permission to include their data in this SPEC Kit.

The University of Illinois at Urbana-Champaign reported the highest number of transactions. This institution has as many as five librarians online simultaneously to take questions and the longest service hours. They have offered their Ask a Librarian service for less than two years. Not surprisingly, the libraries with more modest service hours and staffing levels reported lower numbers of total chat sessions. (See Chart 1.)

Software

A review of library Web sites in December 2002 revealed that, in addition to the 36 survey respondents, 31 other ARL libraries offer chat reference service. While gathering data on the software that these newest services are using, the investigators discovered that software development and preferences are also in flux. Currently, the most popular chat reference systems are Virtual Reference Toolkit from LSSI and 24/7 Reference. Thirteen libraries each use one of these vendor-hosted services. Other products currently being used are, in order of popularity, LivePerson (9 libraries), Live Assistance (7), QuestionPoint (6), eLibrarian (5), AOL Instant Messenger (5), OnDemand (now available through QuestionPoint) (2), Human Click (now LivePerson) (1), divine Virtual Reference Desk (1), and VRLplus (1). The software being used at the remaining four libraries could not be identified.

Collaborative Projects

Collaborative chat reference service projects seem to be increasing among ARL and other libraries. In recent months, Cornell University and the University of Washington have joined to extend the hours of chat service to their patrons. Since three time zones separate their libraries, they are able to extend their service day with the assistance of colleagues across the country. Three Canadian libraries have formed the Ontario Reference Service Cooperative, libraries in the Boston area have added 24/7 chat service via the Boston Library Consortium, and OhioLink and the Washington Regional Library Consortium have begun providing chat reference service to member libraries in Ohio and the Washington D.C. area, respectively. These collaborative efforts, as well as the use of vendors such as 24/7 and LSSI that will respond to questions when an individual library's service is not staffed, are making reference assistance ubiquitous for patrons in many ARL libraries. Staffing chat reference around the clock is something that most libraries can't do, but many still view collaborative chat projects as a way to extend their service schedule. Clearly, it is an approach that enables the library to meet the needs of those who use the Internet as a key source of information, as well as those whose information needs don't coincide with scheduled library reference service. However, some academic librarians remain leery of collaboration. As one librarian put it, "There is a perceived quality issue."

Conclusion

Chat reference is an extremely dynamic new area of library service. The survey and subsequent examination of Web sites revealed that a total of 67 ARL member libraries now offer some type of chat reference service. The number of services almost doubled in less than a year, spreading from 29% of the ARL membership in July 2002 to 54% in December 2002. Clearly, most of these services are very new; 56% of them have been in operation for a year or less.

Not only are ARL libraries adding chat as a medium to extend reference services online at a very rapid rate, they are also experimenting with a variety of software packages and hosted services. Indeed, many libraries have changed software vendors since answering the survey six months ago. At present, vendor-hosted services are the most popular.

Whether called chat, virtual, or online reference, this is an area of library service that is in continual flux at this point in its development. The savvy and committed librarians who constantly adapt new technologies, as well as service policies, to better meet the evolving information needs and search practices of users is perhaps the most constant feature at this time. Another investigation in the future is warranted to see how these librarians shape this new service to meet their users' evolving needs.

Chart 1: Sample Chat Reference Usage Statistics for 2002

Total Sessions	October Sessions	Avg. Daily Sessions	Institution Name	Age of Service	Hrs/Week	Staff Online Simultaneously
7,586	1247	41	University of Illinois at Urbana-Champaign	1–2 years	50–100	5
2,560	325	14	University of Florida	over 2 years	45–56	1–2
1,117	206	9	George Washington University	1–6 months	20	1
923	137	5	University of Minnesota	1–2 years	27	1
484	65	3	Louisiana State University	6 months–1 year	37	1
310	34	2	Massachusetts Institute of Technology	1–2 years	10–28	1
158	52	2	University of California, Santa Barbara	1–6 months	50	1
109	39	2	Syracuse University	1–6 months	38	1
100	25	1	University of California, Davis	1 year	45	1
60	20	1	Michigan State University	1–6 months	20	1

UIUC: Highest in a single day was about 70 sessions, lowest about 10. Monday and Tuesday are highest; Saturday is lowest, consistently.

GWU: Service was available April to May for a six-week pilot and resumed in August.

MIT: Experienced an unusual number of failures due to technical issues. This limited use.

SU and MSU: Both of these were pilot projects.

Survey Results

As new opportunities for online communication develop and user expectations for library service change because of advances in technology, research libraries continue to adapt the channels for delivery of reference services. Early research libraries provided reference services to users at a reference desk or by letter, then added telephone and e-mail as these technologies gained a foothold in their user communities. Telephone and e-mail reference services are now standard services in the typical research library setting. Yet once again, most libraries are finding that user patterns are changing. As fewer users come into libraries and traditional reference services decline, there is growing use of resources that are delivered electronically, especially via the Web. ARL has followed these trends and reported on electronic (primarily e-mail) reference in SPEC Kit 251 *Electronic Reference Service*, in 1999. Since that survey, many libraries have adopted interactive chat reference as the latest delivery mode.

This survey is designed to gather data on chat reference service in ARL member libraries. The intention is both to document the status of chat reference service and to provide assistance to libraries that are exploring or are in the planning stages of initiating such a service.

Chat can be defined as live communication occurring in "real-time" between two online users at computers. Real-time reference often involves simple text-based chatting, but may also include audio and video technology. For the purposes of this survey, chat reference is defined as immediate, interactive reference delivered via computer and real-time communication software such as chat, instant messaging, and other conferencing media that may or may not incorporate a sound or video component.

This survey was designed by Jana Ronan, Interactive Reference Coordinator, and Carol Turner, Associate Director, Public Services Division, University of Florida.

Please submit this survey and send the requested documentation by **July 24, 2002**. As always, individual responses to the survey will be treated confidentially.

Note: Sixty-six of the 124 ARL member libraries (53%) and one nonmember responded to the survey.

Background

1. Does your library offer chat reference service as defined above? (n=67)

Yes	36	54%	Please complete the survey.
No	31	46%	Please submit the survey now.

2. How long has the service been offered? (n=36)

Less than 6 months	7	19%
6 months–1 year	16	44%
1–2 years	11	31%
More than 2 years	2	6%

3. Where on the library Web site is the link(s) to the chat reference service? Check all that apply. (n=36)

Top level	25	69%
Second level	30	83%
Third level or lower	18	50%

Software

4. What software is or has been used for this service? Check all that apply. (n=36)

	Currently	Previously	Considering
Virtual Reference Desk (LSSI)	9	3	2
24/7 Reference	8	2	4
LivePerson	6	2	1
HumanClick	3	2	0
OnDemand (Convey)	2	0	4
LiveAssistance	2	0	1
AOL Instant Messenger	2	2	0
QuestionPoint	1	0	10
NetAgent	1	0	0
Virtual Reference Librarian (ERes)	0	0	2
IRC	0	1	0
ConferenceRoom	0	0	0
eGain Interact	0	0	0
Microsoft Net Meeting	0	0	0
Other	2	1	2

Please name

eGain Interact w/extras

Docutek Virtual Reference Librarian 2.0

MOO

LiveHelper

Currently using Desktop Streaming (ExpertCity). Will be considering E-Librarian, Live Person, and 24/7 Reference.

Morris Messenger

5. What features led you to select the currently used software? Check all that apply. (n=36)

Accessible via Web browser with no software required	29	81%
Push page technology	25	69%
Co-browsing/Escorting	22	61%
Statistics/reports	22	61%
Automation of frequently used resources (phrases, Web page links, etc.)	20	56%
Price	20	56%
Works with PCs, Macs, and other systems	14	39%
Alerts	9	25%
Voice over IP	2	6%
Whiteboarding	1	3%
Other	16	44%

Please describe

Excellent support/Customer service.

Ability for user or provider to share non-Web applications; static and streaming video capabilities; ability to have chat icon appear based on the domain rather than written into the text of the page.

ADA compliant; queue management; form sharing; transcripts; multiple browsing capability.

It was possible to load the software on our own server at a reasonable price, satisfying our concerns about privacy based on ownership of the content of the transaction logs.

It is installed on our in-house Web server so we have complete control of the interface, transcripts, and surveys. Also, for us it was imperative that the service work well with older browsers, Netscape, IE, and would not crash.

Most commonly used product among our primary target population of 18- to 22-year olds.

Easy to use makes training less of an investment.

Training and support provided by vendor.

QuestionPoint is appealing in that it does charge for "per seat" use of the software. It also offers options for locally defining a group of cooperative libraries with which to refer questions when needed. Its Global Reference Network, knowledge base, and other features should be useful. Its support from the Library of Congress and OCLC is reassuring.

Contract flexibility: month to month with no up front costs.

Persistent "call button" available throughout all library Web pages, licensed databases, and any other registered Web site pages or domains.

Automatically sends transcripts to users at end of session.

6. Is the software hosted locally or on the vendor's server? (n=36)

On the vendor's server	30	83%
Locally loaded	4	11%
Other	2	6%

Please explain

eGain software being used by 24/7 is on the vendor's server. The escort server and associated software is located locally.

We have a server-reflector so that we can access proprietary databases.

The vendor provides one server (CRM) and we provide another server (FCM). Once a call has been made and a librarian and client are connected with each other, all communication goes through the FCM.

Staffing

7. Who staffs the service? Check all that apply. (n=36)

General reference librarians	32	89%
Subject specialists	26	72%
Instruction librarians	16	44%
Branch library staff	15	42%
Other support staff	15	42%
Graduate student assistants	10	28%
Undergraduate services specialists	8	22%
Technical services staff	4	11%
Administrative staff	4	11%
Web specialists	2	6%
Systems staff	2	6%
Undergraduate student assistants	2	6%
Consortium staff	1	3%
Other	4	11%

Please explain

Librarians who work in the Business and Economics Resource Center
Government Documents librarians
Collection development librarians
Paraprofessional reference staff

8. How were staff selected to participate in the service? Check all that apply. (n=36)

Assigned as part of reference assignment	25	69%
Volunteered	22	61%
Assigned to new service in addition to ongoing assignments	16	44%
Assigned to this service full-time as primary responsibility	0	
Assigned as part of instructional services	0	
Other	2	6%

Please explain

Volunteered in addition to ongoing assignments.

The decision to offer this service came from reference staff at a staff retreat. All librarians in reference participate in the service.

9. How many hours per week does an individual typically staff the service? (n=36)

Minimum	Maximum	Mean	Median
1	12	3	2.5

Service Schedule

10. Please indicate when and how many hours per week the service is available to users. Check all that apply. (n=35)

If your service schedule is the same throughout the year:

Do you provide service:	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Total Hours/Week			
								Min	Max	Mean	Median
	10	10	10	10	9	0	1	12	45	30.20	33.50

If your service schedule varies throughout the year:

Do you provide service:	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Total Hours/Week			
								Min	Max	Mean	Median
During the academic year	25	25	25	25	25	5	7	15	100	43.27	37.00
During summer session	24	23	23	23	20	4	3	10	83	33.21	22.50
During intersessions or holidays	12	12	12	11	11	1	1	10	52	30.33	30.00

11. Has the schedule changed since the service began? (n=36)

Yes	23	64%	Please explain
No	7	19%	
Change is being considered	6	17%	Please explain

In general, those who have changed the schedule started the service with a small number of hours and have increased the number of days and/or number of hours each day that the service is offered as demand and the number of volunteers both increase. A few have eliminated service during low-use times.

Four respondents who are considering a schedule change are preparing to begin consortial service. Two others expect to increase hours when the fall semester begins.

Organization and Management

12. What is the title of the individual or team who manages the day-to-day operations of the service? (n=36)

Team	12	33%
Head of Reference	9	25%
Head of Electronic/Digital/Interactive Reference	8	23%
Other	7	19%

Team names include: Digital Reference Services Group, Virtual Reference Team, Real Time Reference Team, Chat Reference Committee, WebChat Action Team, Live Ref Team

Other individuals include: Distributed Learning Services Librarian, Business and Economics Reference Librarian, Sciences Librarian, Social Sciences Librarian, reference coordinators, reference assistant coordinator

13. To whom does this individual or team report? (n=36)

Director	4	11%
Assistant/Associate Director	10	28%
Head of Information/Public/User Services	8	22%
Head of Reference	10	28%
Other	6	17%

Head of Health Sciences Library, Business and Economics Bibliographer, Social Sciences Division Head, Director of Humanities and Social Sciences Services, team or advisory group

Several individuals have dual reporting lines, typically to a department head and an AUL.

14. Where does staff work while providing chat reference service? Check all that apply. (n=36)

In an individual's office	30	83%
At a service desk computer, concurrent with desk service	13	36%
At home or another location of the individual's choice	8	22%
At a location dedicated to the service	7	19%
Other	6	17%

Please explain

Electronic classroom.

Occasionally, we handle it from the Reference Desk for a short period of time, but this is only in an emergency. Our desk is too busy most of the time.

At a terminal adjacent to the desk, but behind a wall, concurrent with desk service at night.

Staff can work at any computer that has Internet access.

At a multi-purpose computer in Reference Dept. Office.

We monitor from two libraries. At one library the desk is the sole public service point (ref, circ, ILL intake, etc.) and at that library the chatref is monitored in an individual's office. At the other library the ref. desk is THE service point and of course we juggle face-to-face and telephone questions with the chatref. So far this is ok.

Skills and Training

15. How important are the following skills for staff providing chat reference? Please rate each skill on a scale of 1 to 5 with 1 being Not Important and 5 being Most Important. (n=36)

	Not Imp.	2	3	4	Most Imp.
Reference interview skills	—	—	2	8	26
Facility with Web-based information resources	—	—	—	12	24
Comfort with computers and ability to use the software	—	—	—	15	21
Ability to make good referrals	—	1	2	14	19
Facility navigating the Web	—	—	4	16	16
Familiarity with general reference resources	—	—	7	16	13
Teaching skills	—	2	12	18	4
Familiarity with specialized subject resources	—	9	16	7	4
Keyboarding skills	—	1	17	15	3
Other	—	—	—	4	2

Please explain

Written communication skills.

The ability to juggle many windows and tasks is very important.

Interest in participating in something new.

Knowledge of the library and university (policies, assignments, etc), knowledge of how to do chat (short sentences, etc.), sense of humor and common sense.

Familiarity with the chat medium, for example, knowing that quickness is more important than perfect spelling. (Several responses)

Patience and calm demeanor. Good critical thinking or analytical skills—can get to the heart of the question quickly.

Good judgment in knowing when to co-browse, when to just provide a response, and when a question needs more extensive work, with a response provided via e-mail or telephone.

Patience when dealing with patrons and to keep the patron aware of what you are doing. This will help keep the patron at ease.

16. Did current staff have these skills or did they require additional training? (n=36)

Had the necessary skills	11	31%
Needed additional training	25	69%

Please explain

Use of the specific software	19
Chat technique ("Chattiquette")	10
Reference sources	5
Other	4

Reviewed information about [partner] libraries for our collaborative project.

We are staffing this as a general service, while all our service points (10) are subject-specific. All staffers of the digital reference service had to be cross-trained to handle at least a basic level of questions on any subject.

The ability to know when to co-browse and when to refer have developed as staff have become comfortable with this mode of communication.

Staff found comfort in additional training so that they could see that everyone was starting in the same boat.

Publicity

17. How has the chat reference service been promoted to users? Check all that apply. (n=36)

Highlighted on library Web page	32	89%
Included in library orientations and instruction	30	83%
Library newsletter article(s)	24	67%
Articles or news releases in local papers	22	61%
Flyers	18	50%
Correspondence with users	18	50%
Bookmarks	12	33%
Other	13	36%

Please explain

Posters in campus buildings and kiosks; 1/4 sheet flyers in dorm mailboxes; table topper in cafeterias.

Gave out flyers with candy attached at the Reference desk.

"Do not disturb" door hangers, t-shirts.

Promoted the service in faculty meetings and correspondence.

We work closely with the University's Web portal for students and faculty, and have the service highlighted on a regular basis within it.

Ads in student newspapers have been very useful.

Included in orientation sessions, admissions Web site, orientation print materials for students and parents.

The service was also featured in some national press as a result of University News Bureau press releases.

Link place on Course Management System (Blackboard) portal. Imbedded in subject librarian Web subject guides. Other promotional items, such as candy with library labels affixed.

Worked with Alumni Association.

Distributed computer monitor calendar strips.

Stickers on selected computers in library.

Announcement made on listservs.

User Characteristics

18. Who is eligible to use the service? Check all that apply. (n=36)

	Eligible to use	Uses most
The institution's graduate students	30	11
The institution's faculty	30	3
The institution's undergraduates	29	26
The institution's staff	29	1
Anyone from anywhere	23	5
Members of the local community	15	2
Consortium members	14	0
Other	5	3

Please explain

Students, faculty, and staff from the [partner] university due to our collaborative chat project.

Anyone sitting in the library at a networked computer.

Alumni, international students.

Anyone with questions on the library's resources.

Others with any version of Convey's call button client software when they are looking at our Web site or catalog.

19. What types of questions do users most frequently ask? On a scale of 1 to 5, where 1 equals Rarely and five equals Most Often, please rate how frequently each of the following types of questions is asked. (n=36)

	Rarely	2	3	4	Most Often
Questions about library services	1	1	9	14	10
Questions about using institution-held electronic resources	2	—	8	17	9
Questions about library collections	3	4	4	16	9
Questions about connectivity and/or access to online resources	1	4	10	13	6
In-depth research questions	2	13	9	5	6
Questions about using resources on the Web	7	12	7	3	6
Basic factual questions	5	16	7	4	2
Other	1	1	1	1	2

Please explain

Most are questions from other librarians wanting to know about the service.
Tracking down citations.
Questions about how to find information on, or how to find movie, book review, doing a paper on x how do I get info or what database is best.
Class assignment related questions that may be more than factual questions, but not in-depth reference.

20. Have staff noticed people using this service while in the library (instead of coming to traditional service desks)? (n=36)

Yes	25	69%
No	11	31%

Evaluation

21. What techniques are used to evaluate the effectiveness of chat reference? Check all that apply. (n=36)

Track the number of transactions	35	97%
Ask users to fill out a Web survey	21	58%
Conduct focus groups	4	11%
Interview users periodically	3	8%
Other	11	31%

Please explain

Review the chat transcripts. (8 responses)
Questions about use of chat are asked as a part of broader based focus groups.
Surveyed librarians on their use of the service to improve performance and address concerns.

We have just started a web survey that is provided by the chat software. We discuss chat experiences in staff meetings.

We have a reference statistics week each semester, when librarians record each question asked and the time it took to answer it. Chat reference is included in that data collection.

There are both entrance and exit questionnaires on the Web. Entrance surveys gather demographic information; exit survey is an evaluation of the service.

We have an online log for librarians to record their experiences providing dig. ref.—what works and what doesn't.

22. If the library tracks the number of chat reference transactions, has the number of transactions changed since the service began? (n=35)

Increased	23	64%
Decreased	3	8%
About the same	9	25%

If there has been a change, to what do you attribute this change? (n=26)

Increase

Word of mouth, return uses, and promotional campaign.

Word spreads that the service exists; we expect a considerable increase this fall when we implement the recommendations of a marketing study prepared for the service.

Placing an icon for the service on the library's homepage.

Better publicity and addition of "chat button" on more of our Web pages.

Partnership with another university; Increased hours.

We have been publicizing the service and more users are now aware of the chat reference service.

Lots of patrons come back to the service after they have used it once and we keep adding links.

There was a slight increase from the first to the second semester offered—this is due to fall enrollment being higher than in the summer. Usage remained constant from fall to spring, because the number of staff online at any one time (1) did not increase.

Introducing past new services showed us that it takes about two years for services to work their way into the "fabric" of the university. We have also seen more librarians from other institutions coming into the Chat Room to learn more about the service.

Very generally, uses are high at the beginning of each semester (right after user ed classes) and drop off through the semester.

Decrease

Fewer students on campus during spring/summer terms; less publicity during spring/summer.

There was a slow down in the 2002 summer months compared to the steadily increasing number of transactions during the 2002 spring semester.

Usage decreased as the academic semester ended.

23. We would like your impressions about the quality of your library's chat reference service relative to your expectations. (n=35)

For each of the following statements, please:

(a) Choose one of the numbers in the first column to indicate the **minimum** performance level you consider adequate for your library to achieve;
(b) Choose one of the numbers in the second column to indicate the level of performance you **desire** from your library; and
(c) Choose one of the numbers in the third column (or N for no opinion) to indicate your **perception** of your library's actual performance level.

	The Minimum Performance Level Is:			**The Desired Performance Level Is:**			**My Perception of My Library's Actual Performance Is:**		
When it comes to...	**Mean**	**Std Dev**	**n**	**Mean**	**Std Dev**	**n**	**Mean**	**Std Dev**	**n**
Ease of use of chat reference	6.89	1.4	35	8.54	.74	35	6.83	1.2	35
Number of service hours	5.73	1.4	33	8.03	.99	34	5.29	1.7	34
Accuracy of answers	7.43	1.2	35	8.71	.62	35	7.06	1.9	35
Evaluating the service	6.09	1.5	33	8.06	1.0	33	5.56	2.2	34

Additional Comments

24. Please submit any additional information regarding chat reference at your institution that may assist us in accurately analyzing the results of this survey. (n=20)

A number of respondents commented that they were in a pilot phase or just beginning the service and would have more experience after the fall semester.

An opinion—chat cannot stand alone. It is most advantageous when used in concert with other reference service delivery formats, including e-mail, phone, and in-person. It should be considered by reference staffs and users alike as another choice on the spectrum of methods that questions can be asked, discussed, and answered.

We get a number of questions that require more research. We do not do these in chat mode. We ask if e-mail will be all right in getting back to people and they have all said "yes." Then we work on the question and e-mail back the answer. Sometimes they are in-depth because they are difficult questions and sometimes they are in-depth and require more time because they are glitches with the catalog record, etc. and require time to track down the correct answer in the library.

We originally started Chat Reference because we knew undergraduates were using Instant Messenger constantly. We also realized that many students who were in the library computer areas needed reference assistance, but would not leave their computers to ask for help because someone else would quickly take over their computers. Both of these assumptions turned out to be true in both years of the service.

The first year of the service was administered by the libraries' Web Coordinator using librarians assigned to the service and graduate assistants from the School of Informatics. A temporary librarian evaluated the service extensively and published her results in a recent article ("Instant Messaging Reference Service: A Case Study," Marianne Foley, *College & Research Libraries* 63(1): 36–45, Jan. 2002). In the summer of 2001, the service was transferred to the Arts and Sciences Libraries Public Services area.

During the first year of the service, we experimented with offering the service from a reference desk. We quickly found the approach unacceptable, because users would not wait for an answer in the Chat Room when the librarian was working with a person in the library. The "instant" nature of the service is essential.

Since we started the service in January, we have been collaborating with [an east coast] university to enable both institutions to cover more hours. [They] monitor the service for us beginning at 7 am Pacific time until 1 pm Pacific time. We take over at 1 pm, monitoring the service until 9 pm Pacific. This is the schedule during the regular academic year. We have over 25 librarians involved in providing the service. They monitor the service from their offices or from home, and only from a public service desk when we have a problem covering an hour.

This summer (beginning July 30th to be exact) [we] will begin training every reference librarian to provide electronic reference. We maintain both e-mail and chat reference services. We will train librarians from each of the three branches (Main, Medical Center, Science) to answer questions submitted to this centralized service. Therefore, each of our librarians will handle questions from many different subject disciplines. I plan to organize periodic in-service sessions to review resources useful for answering commonly asked questions within each discipline. After all, it is likely that some of the humanities librarians are not necessarily familiar with the latest chemistry resources, etc. and vice-versa.

We feel by training them on e-mail reference initially, they will be exposed to questions from many different disciplines and yet have the time to prepare a thoughtful answer and, if necessary, consult with librarians who may be better versed in the subject. This preparation/exposure will better enable the librarian to answer chat questions outside of their discipline.

We are working in a five-campus consortium, which has allowed us to share resources despite low-level software. Over the past six months we have applied for grants, monitored other consortia, and attended conferences to keep up with software improvements with the purpose of finding a way to upgrade our existing software. We wish to extend our hours (without significantly increasing the cost) and add features. Increasing the number of partners is a way to do this. The volunteer nature of our staffing will disappear this summer as we train all staff who work on the reference desk to do chat reference.

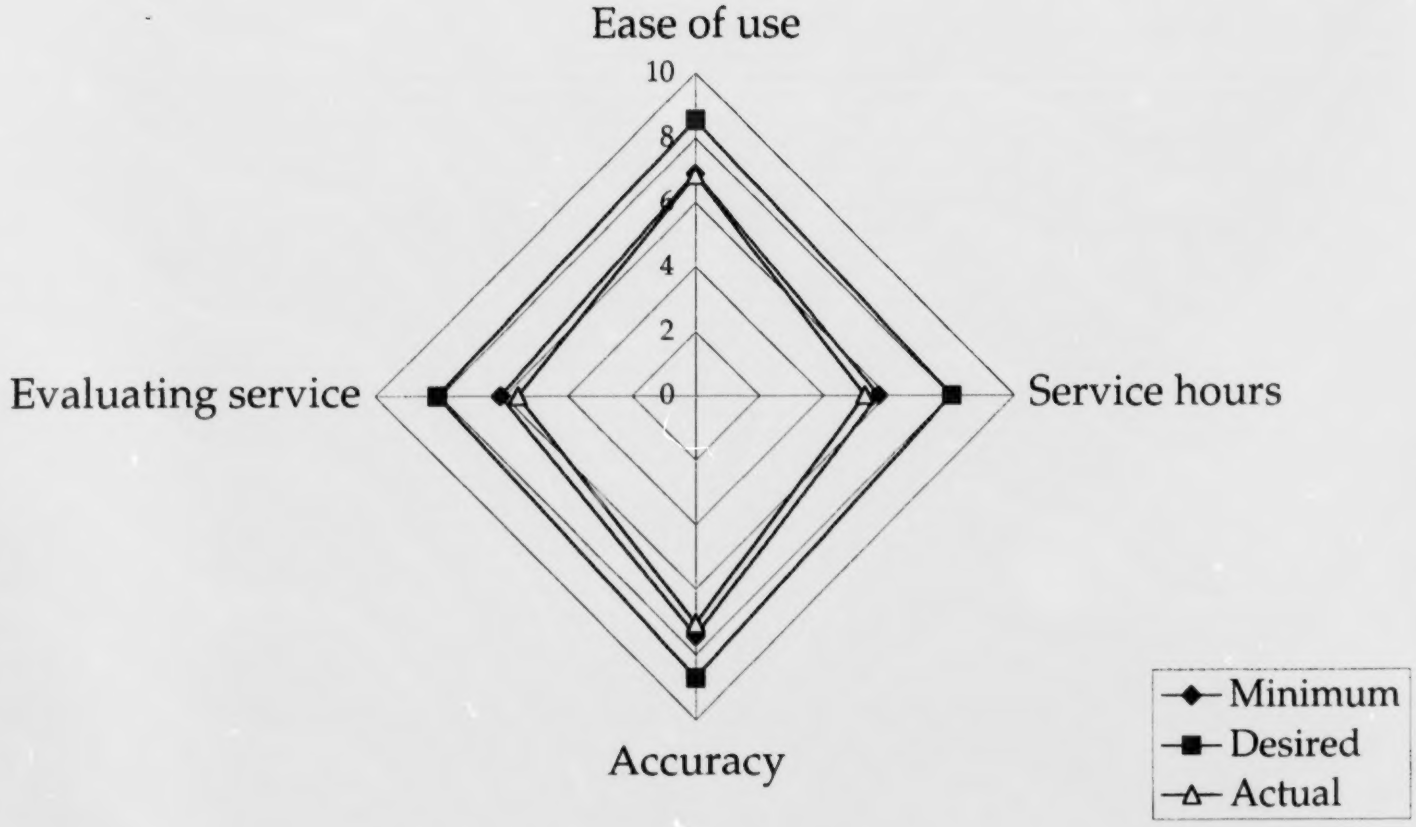
More publicity is needed but we mean to target a small group (medical and veterinary colleagues) and therefore large-scale promotions have not been done. In my opinion chatref must become an expectation of all library users everywhere and then it will be looked for on any library's Web page. General awareness by the public is important.

This year has been a time for all of the librarian-agents to become familiar with the software and its capabilities. This has generally occurred. If we get increased usage we may, at all agent-stations, begin to monitor from off the ref. desk.

The service is considered wonderful by patrons. There has been no negative feedback from them even if there are glitches with the software (session dropped or co-browsing does not work). On the other hand, software problems are very disturbing to librarian-agents.

If chat reference is to continue, it will be as part of our total reference service package and will undergo programmatical evaluation, training, and scheduling in the same manner as traditional reference.

Perceptions of Chat Reference Performance



Responding Institutions

- University of Alabama
- University of Alberta
- Auburn University
- Boston College
- Brigham Young University
- University of British Columbia
- University of California, Davis
- University of California, Irvine
- University of California, Los Angeles
- University of California, Riverside
- University of California, San Diego
- University of California, Santa Barbara
- Canada Institute for Scientific and Technical Information
- Case Western Reserve University
- University of Chicago
- University of Connecticut
- Cornell University
- Dartmouth College
- University of Florida
- Florida State University
- George Washington University
- University of Guelph
- University of Hawaii at Manoa
- University of Houston
- University of Illinois at Urbana-Champaign
- Indiana University Bloomington
- Iowa State University
- Johns Hopkins University
- Kent State University
- University of Kentucky
- Université Laval
- Library of Congress
- Louisiana State University
- McMaster University
- University of Massachusetts, Amherst
- Massachusetts Institute of Technology
- University of Miami
- University of Michigan
- Michigan State University
- University of Minnesota
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- University of Nebraska–Lincoln
- University of New Mexico
- University of North Carolina at Chapel Hill
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- University of Notre Dame
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- Ryerson University
- Southern Illinois University
- University at Albany, SUNY
- University at Buffalo, SUNY
- Syracuse University
- University of Tennessee
- University of Texas at Austin
- Tulane University
- Vanderbilt University
- University of Virginia
- Virginia Tech
- University of Washington
- Washington State University
- Washington University in St. Louis
- University of Waterloo
- Wayne State University
- University of Western Ontario
- University of Wisconsin–Madison
- Yale University
- York University

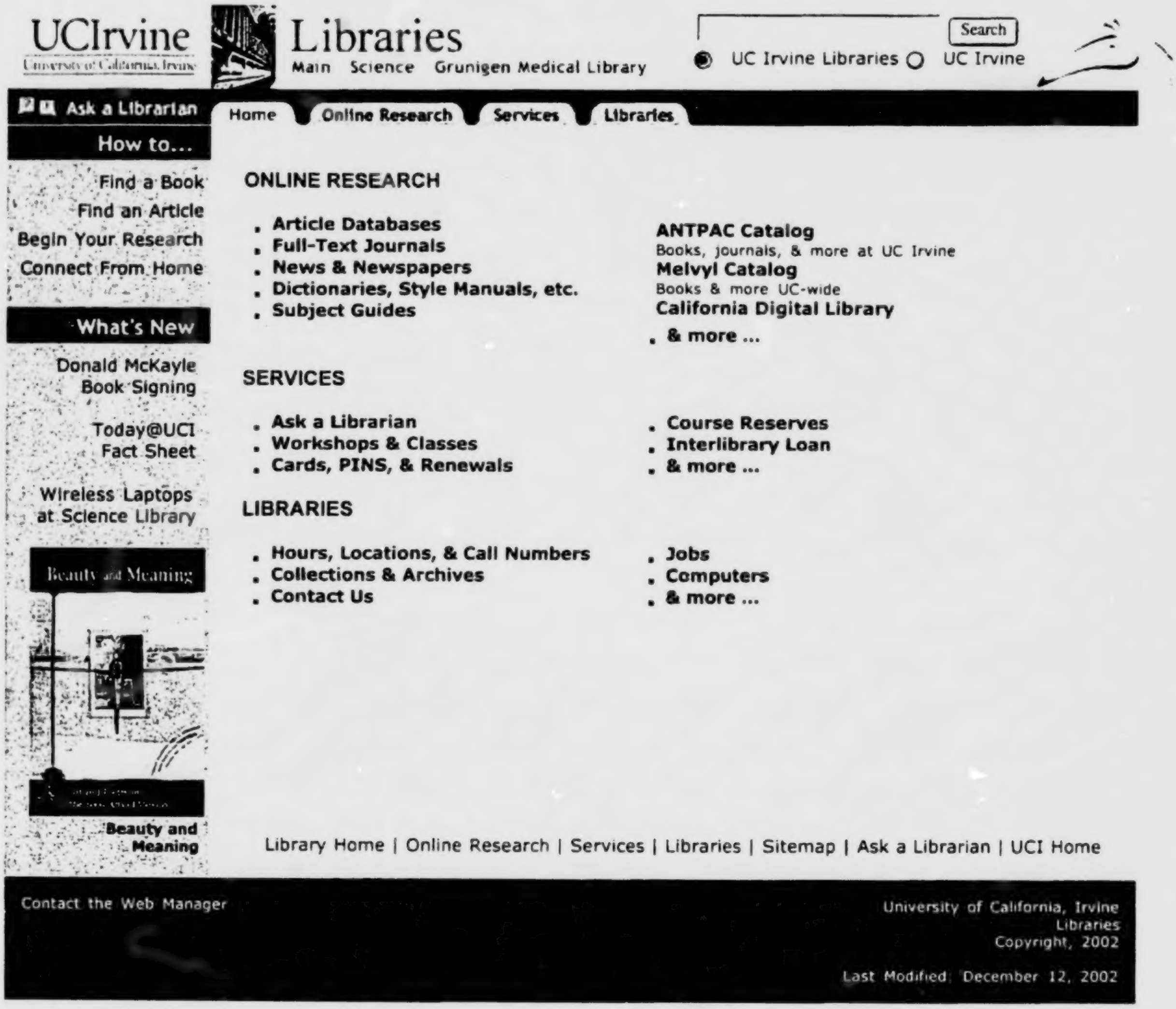
SPEC

REPRESENTATIVE DOCUMENTS

Chat Reference on the Web

UNIVERSITY OF CALIFORNIA, IRVINE

http://www.lib.uci.edu/index.html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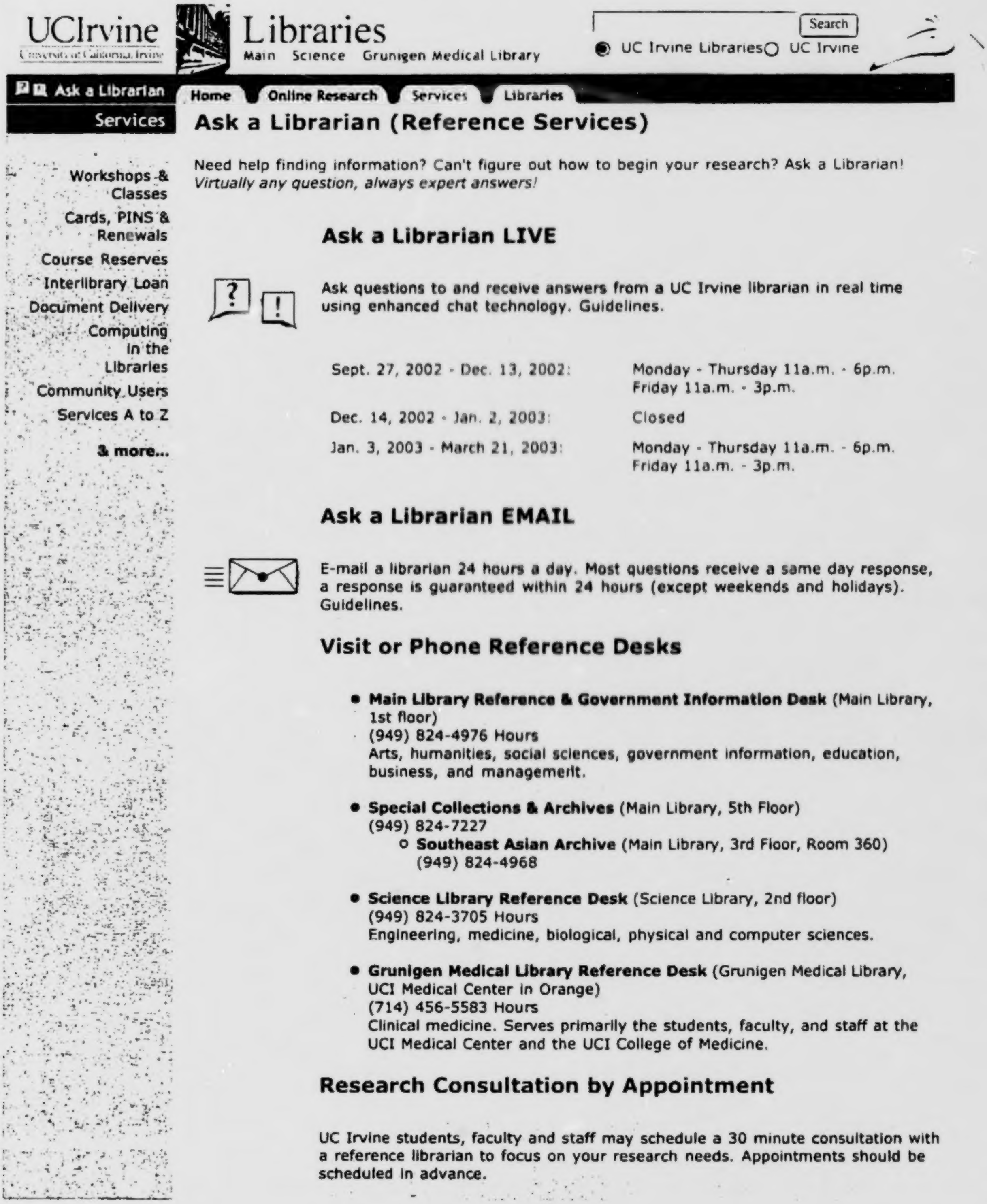
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Services A to Z
& more...

Ask a Librarian (Reference Services)

Need help finding information? Can't figure out how to begin your research? Ask a Librarian! *Virtually any question, always expert answers!*

Ask a Librarian LIVE

Ask questions to and receive answers from a UC Irvine librarian in real time using enhanced chat technology. Guidelines.

Sept. 27, 2002 - Dec. 13, 2002:	Monday - Thursday 11a.m. - 6p.m. Friday 11a.m. - 3p.m.
Dec. 14, 2002 - Jan. 2, 2003:	Closed
Jan. 3, 2003 - March 21, 2003:	Monday - Thursday 11a.m. - 6p.m. Friday 11a.m. - 3p.m.

Ask a Librarian EMAIL

E-mail a librarian 24 hours a day. Most questions receive a same day response, a response is guaranteed within 24 hours (except weekends and holidays). Guidelines.

Visit or Phone Reference Desks

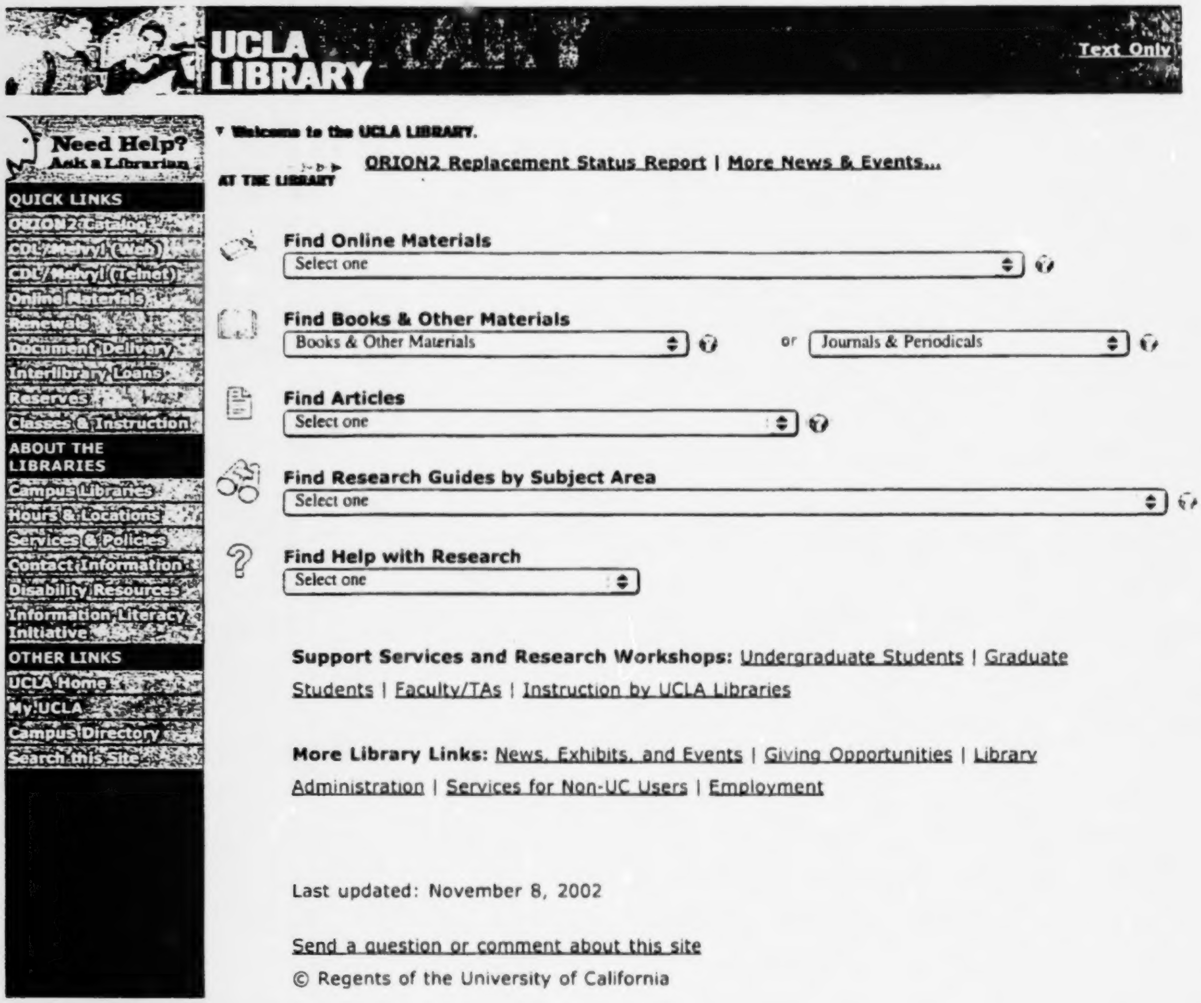
- **Main Library Reference & Government Information Desk** (Main Library, 1st floor)
  (949) 824-4976 Hours
  Arts, humanities, social sciences, government information, education, business, and management.
- **Special Collections & Archives** (Main Library, 5th Floor)
  (949) 824-7227
  - **Southeast Asian Archive** (Main Library, 3rd Floor, Room 360)
    (949) 824-4968
- **Science Library Reference Desk** (Science Library, 2nd floor)
  (949) 824-3705 Hours
  Engineering, medicine, biological, physical and computer sciences.
- **Grunigen Medical Library Reference Desk** (Grunigen Medical Library, UCI Medical Center in Orange)
  (714) 456-5583 Hours
  Clinical medicine. Serves primarily the students, faculty, and staff at the UCI Medical Center and the UCI College of Medicine.

Research Consultation by Appointment

UC Irvine students, faculty and staff may schedule a 30 minute consultation with a reference librarian to focus on your research needs. Appointments should be scheduled in advance.

UNIVERSITY OF CALIFORNIA, LOS ANGELES

http://www.library.ucla.edu/



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Hours & Locations
Services & Policies
Contact Information
Disability Resources
Information Literacy Initiative
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▾ Welcome to the UCLA LIBRARY.

AT THE LIBRARY ORION2 Replacement Status Report | More News & Events...

Find Online Materials
Select one

Find Books & Other Materials
Books & Other Materials or Journals & Periodicals

Find Articles
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Find Research Guides by Subject Area
Select one

Find Help with Research
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Support Services and Research Workshops: Undergraduate Students | Graduate Students | Faculty/TAs | Instruction by UCLA Libraries

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Last updated: November 8, 2002

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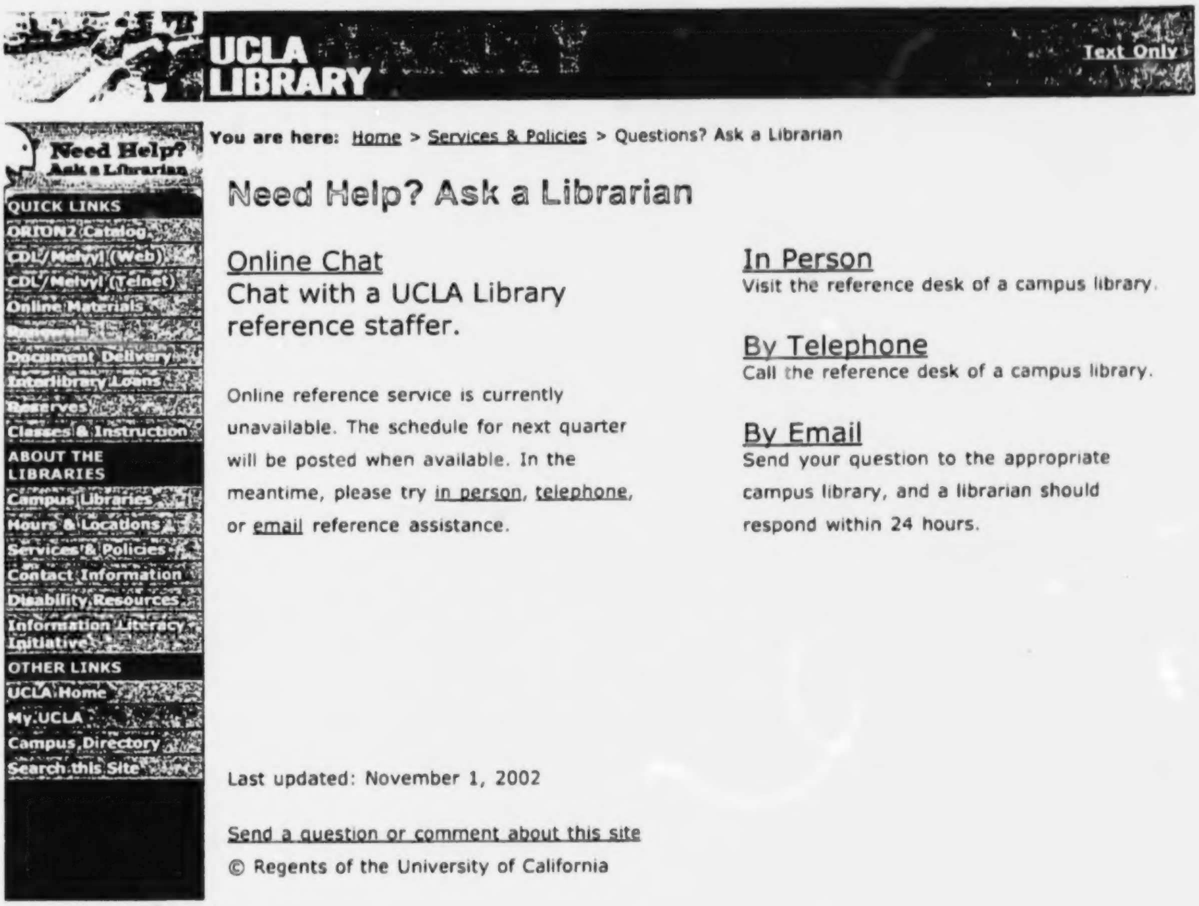
UNIVERSITY OF CALIFORNIA, LOS ANGELES

http://help.library.ucla.edu/index.cfm


UCLA LIBRARY
Text Only
Need Help? Ask a Librarian
QUICK LINKS
ORION2 Catalog
CDL/Melvyl (Web)
CDL/Melvyl (Telnet)
Online Materials
Renewals
Document Delivery
Interlibrary Loans
Reserves
Classes & Instruction
ABOUT THE LIBRARIES
Campus Libraries
Hours & Locations
Services & Policies
Contact Information
Disability Resources
Information Literacy Initiative
OTHER LINKS
UCLA Home
My.UCLA
Campus Directory
Search this Site

You are here: Home > Services & Policies > Questions? Ask a Librarian

Need Help? Ask a Librarian

Online Chat

Chat with a UCLA Library reference staffer.

Online reference service is currently unavailable. The schedule for next quarter will be posted when available. In the meantime, please try in person, telephone, or email reference assistance.

In Person

Visit the reference desk of a campus library.

By Telephone

Call the reference desk of a campus library.

By Email

Send your question to the appropriate campus library, and a librarian should respond within 24 hours.

Last updated: November 1, 2002

Send a question or comment about this site

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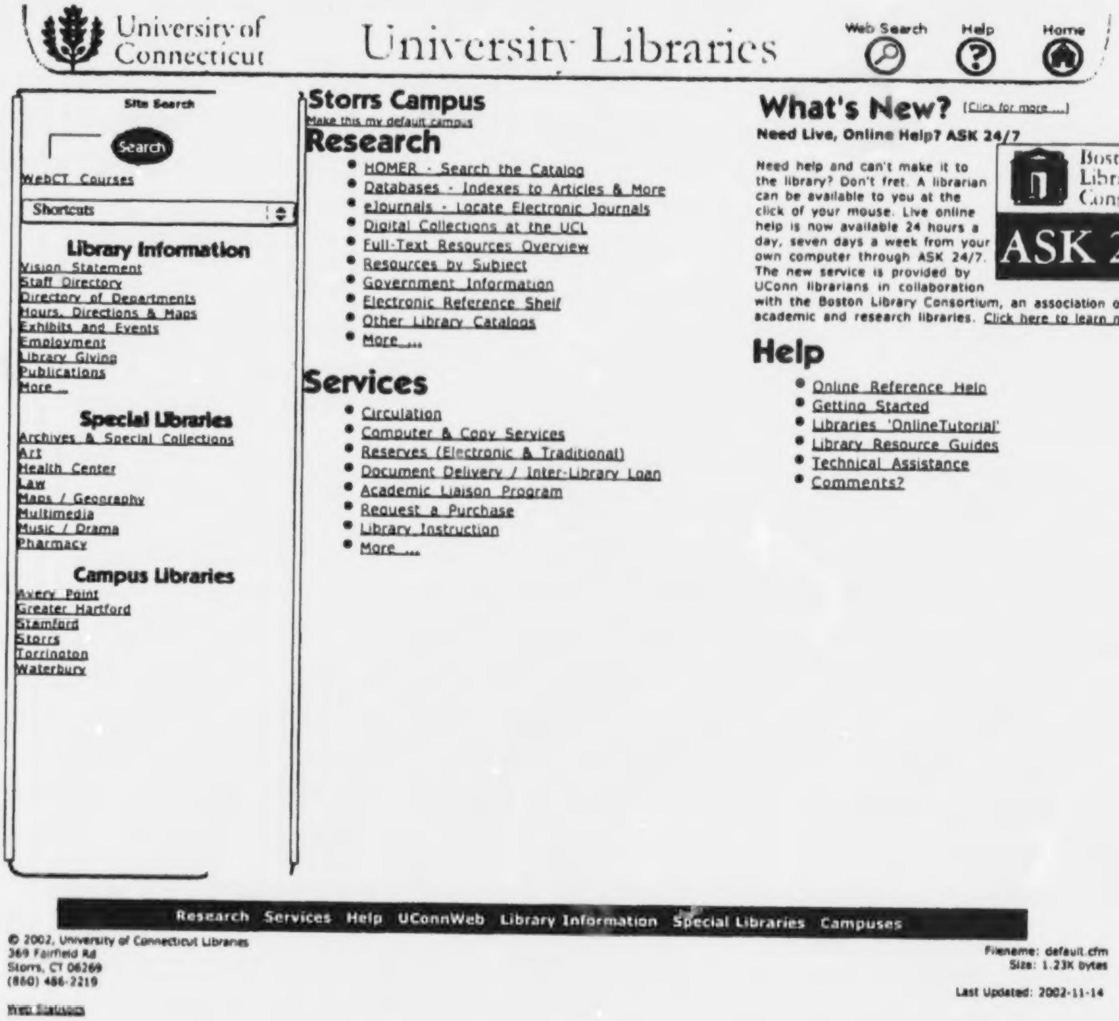
UNIVERSITY OF CONNECTICUT

http://norman.lib.uconn.edu/NewSpirit/Redesign/default.cfm



WebCT Courses

Library Information

Vision Statement
Staff Directory
Directory of Departments
Hours, Directions & Maps
Exhibits and Events
Employment
Library Giving
Publications
More ...

Special Libraries

Archives & Special Collections
Art
Health Center
Law
Maps / Geography
Multimedia
Music / Drama
Pharmacy

Campus Libraries

Avery Point
Greater Hartford
Stamford
Storrs
Torrington
Waterbury

Storrs Campus

Make this my default campus

Research

- HOMER - Search the Catalog
- Databases - Indexes to Articles & More
- eJournals - Locate Electronic Journals
- Digital Collections at the UCL
- Full-Text Resources Overview
- Resources by Subject
- Government Information
- Electronic Reference Shelf
- Other Library Catalogs
- More ...

Services

- Circulation
- Computer & Copy Services
- Reserves (Electronic & Traditional)
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- Request a Purchase
- Library Instruction
- More ...

What's New? [Click for more ...]

Need Live, Online Help? ASK 24/7

Boston Library Consortium
ASK 24/7

Need help and can't make it to the library? Don't fret. A librarian can be available to you at the click of your mouse. Live online help is now available 24 hours a day, seven days a week from your own computer through ASK 24/7. The new service is provided by UConn librarians in collaboration with the Boston Library Consortium, an association of 19 academic and research libraries. Click here to learn more ...

Help

- Online Reference Help
- Getting Started
- Libraries 'OnlineTutorial'
- Library Resource Guides
- Technical Assistance
- Comments?

Research Services Help UConnWeb Library Information Special Libraries Campuses

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Storrs, CT 06269
(860) 486-2219

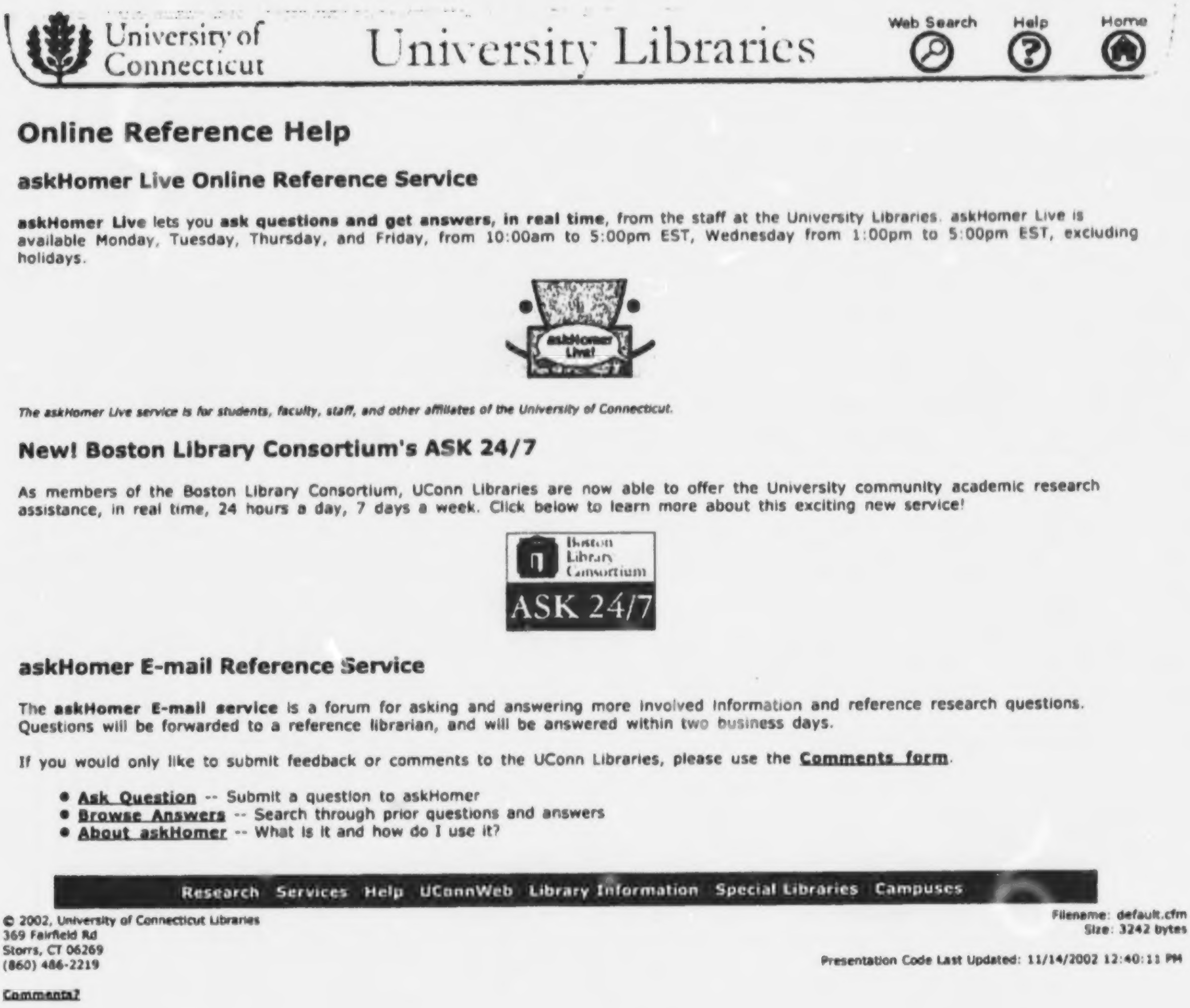
Web Statistics

Filename: default.cfm
Size: 1.23K bytes

Last Updated: 2002-11-14

UNIVERSITY OF CONNECTICUT

http://norman.lib.uconn.edu/askHomer/



University of Connecticut
University Libraries
Web Search
Help
Home

Online Reference Help

askHomer Live Online Reference Service

askHomer Live lets you **ask questions and get answers, in real time**, from the staff at the University Libraries. askHomer Live is available Monday, Tuesday, Thursday, and Friday, from 10:00am to 5:00pm EST, Wednesday from 1:00pm to 5:00pm EST, excluding holidays.

askHomer Live!

The askHomer Live service is for students, faculty, staff, and other affiliates of the University of Connecticut.

New! Boston Library Consortium's ASK 24/7

As members of the Boston Library Consortium, UConn Libraries are now able to offer the University community academic research assistance, in real time, 24 hours a day, 7 days a week. Click below to learn more about this exciting new service!

Boston Library Consortium
ASK 24/7

askHomer E-mail Reference Service

The **askHomer E-mail service** is a forum for asking and answering more involved information and reference research questions. Questions will be forwarded to a reference librarian, and will be answered within two business days.

If you would only like to submit feedback or comments to the UConn Libraries, please use the **Comments form**.

- **Ask Question** -- Submit a question to askHomer
- **Browse Answers** -- Search through prior questions and answers
- **About askHomer** -- What is it and how do I use it?

Research Services Help UConnWeb Library Information Special Libraries Campuses

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Comments?

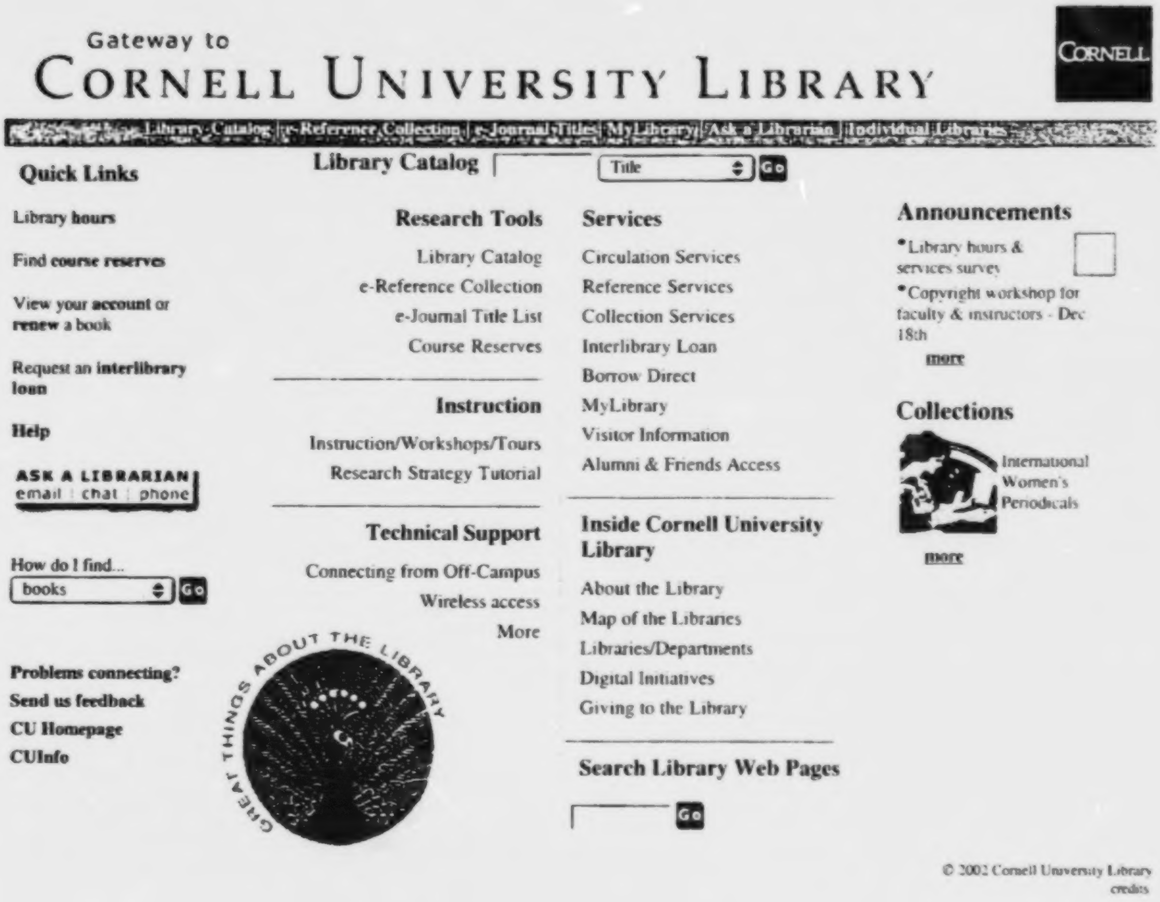
Filename: default.cfm
Size: 3242 bytes

Presentation Code Last Updated: 11/14/2002 12:40:11 PM

BEST COPY AVAILABLE

CORNELL UNIVERSITY

http://campusgw.library.cornell.edu/



Gateway to
CORNELL UNIVERSITY LIBRARY

CORNELL

Library Catalog | e-Reference Collection | e-Journal Titles | MyLibrary | Ask a Librarian | Individual Libraries

Quick Links

Library hours

Find course reserves

View your account or renew a book

Request an interlibrary loan

Help

ASK A LIBRARIAN
email | chat | phone

How do I find...
books

Go

Problems connecting?
Send us feedback
CU Homepage
CUInfo

Library Catalog Title Go

Research Tools

Library Catalog
e-Reference Collection
e-Journal Title List
Course Reserves

Instruction

Instruction/Workshops/Tours
Research Strategy Tutorial

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Connecting from Off-Campus
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Reference Services
Collection Services
Interlibrary Loan
Borrow Direct
MyLibrary
Visitor Information
Alumni & Friends Access

Inside Cornell University Library

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Map of the Libraries
Libraries/Departments
Digital Initiatives
Giving to the Library

Search Library Web Pages

Go

Announcements

- Library hours & services survey
- Copyright workshop for faculty & instructors - Dec 18th

more

Collections

International Women's Periodicals

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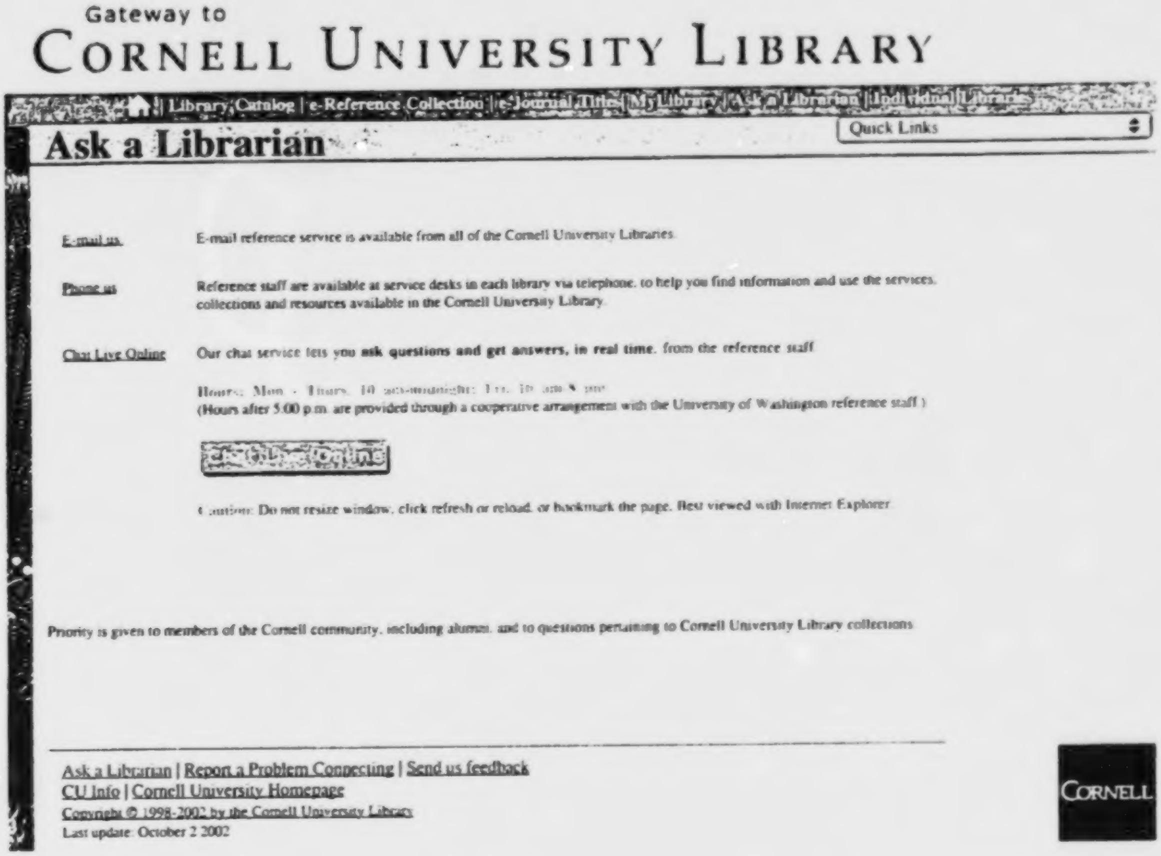
http://campusgw.library.cornell.edu/services/askalib.html


Gateway to
CORNELL UNIVERSITY LIBRARY
Library Catalog | e-Reference Collection | e-Journal Titles | MyLibrary | Ask a Librarian | Individual Libraries
Quick Links
Chat Live Online
CORNELL

Ask a Librarian

E-mail us E-mail reference service is available from all of the Cornell University Libraries.

Phone us Reference staff are available at service desks in each library via telephone, to help you find information and use the services, collections and resources available in the Cornell University Library.

Chat Live Online Our chat service lets you **ask questions and get answers, in real time**, from the reference staff.

Hours: Mon - Thurs. 10 am-midnight; Fri. 10 am-5 pm
(Hours after 5:00 p.m. are provided through a cooperative arrangement with the University of Washington reference staff.)

Caution: Do not resize window, click refresh or reload, or bookmark the page. Best viewed with Internet Explorer.

Priority is given to members of the Cornell community, including alumni, and to questions pertaining to Cornell University Library collections.

Ask a Librarian | Report a Problem Connecting | Send us feedback
CU Info | Cornell University Homepage

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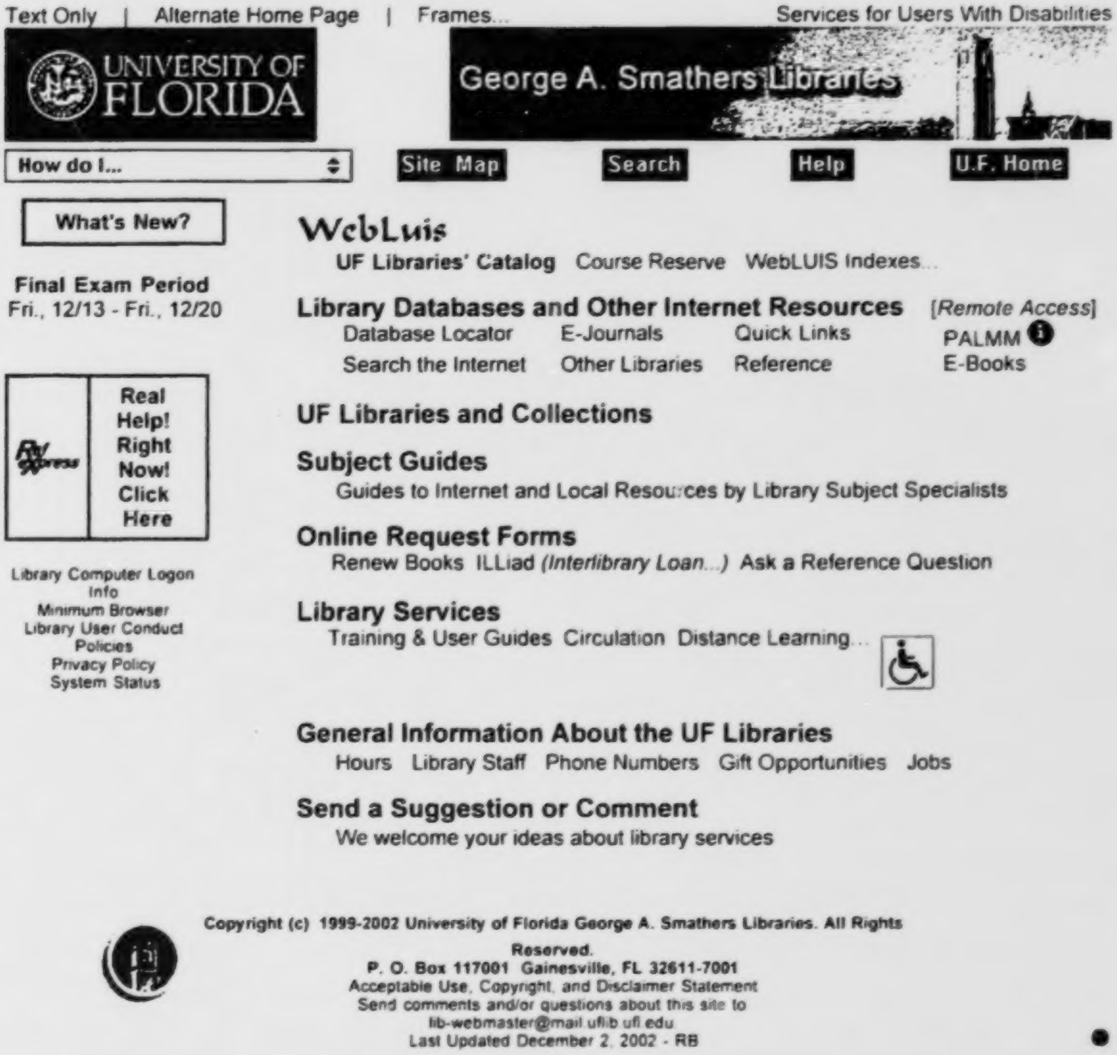
UNIVERSITY OF FLORIDA

http://www.uflib.ufl.edu/



Text Only | Alternate Home Page | Frames... Services for Users With Disabilities

UNIVERSITY OF FLORIDA

George A. Smathers Libraries

How do I...

Site Map Search Help U.F. Home

What's New?

Final Exam Period
Fri., 12/13 - Fri., 12/20

Real Help! Right Now! Click Here

Library Computer Logon Info
Minimum Browser
Library User Conduct Policies
Privacy Policy
System Status

WebLuis

UF Libraries' Catalog Course Reserve WebLUIS Indexes...

Library Databases and Other Internet Resources *[Remote Access]*

Database Locator E-Journals Quick Links PALMM
Search the Internet Other Libraries Reference E-Books

UF Libraries and Collections

Subject Guides

Guides to Internet and Local Resources by Library Subject Specialists

Online Request Forms

Renew Books ILLiad *(Interlibrary Loan...)* Ask a Reference Question

Library Services

Training & User Guides Circulation Distance Learning...

General Information About the UF Libraries

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We welcome your ideas about library services

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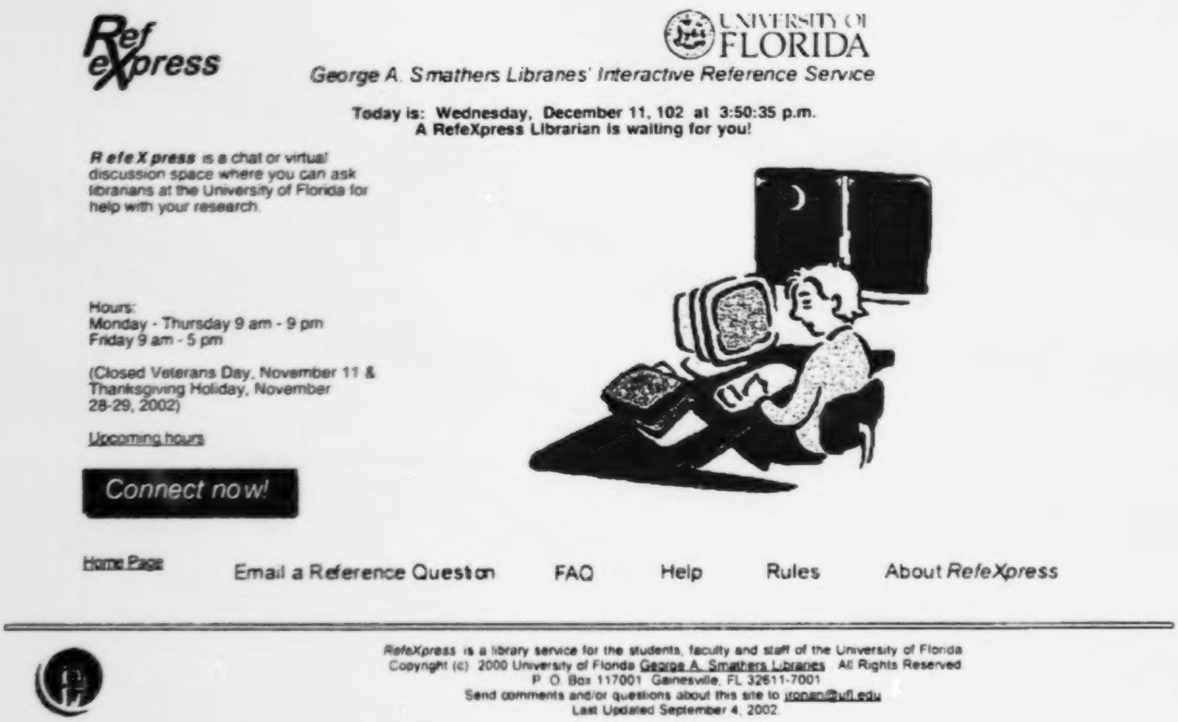
lib-webmaster@mail.uflib.ufl.edu
Last Updated December 2, 2002 - RB

UNIVERSITY OF FLORIDA

http://refexpress.uflib.ufl.edu/


RefeXpress
UNIVERSITY OF FLORIDA
Connect now!
Home Page
Email a Reference Question
FAQ
Help
Rules
About RefeXpress

George A. Smathers Libraries' Interactive Reference Service

Today is: Wednesday, December 11, 102 at 3:50:35 p.m.
A RefeXpress Librarian is waiting for you!

RefeXpress is a chat or virtual discussion space where you can ask librarians at the University of Florida for help with your research.

Hours:
Monday - Thursday 9 am - 9 pm
Friday 9 am - 5 pm

(Closed Veterans Day, November 11 & Thanksgiving Holiday, November 28-29, 2002)

Upcoming hours

RefeXpress is a library service for the students, faculty and staff of the University of Florida
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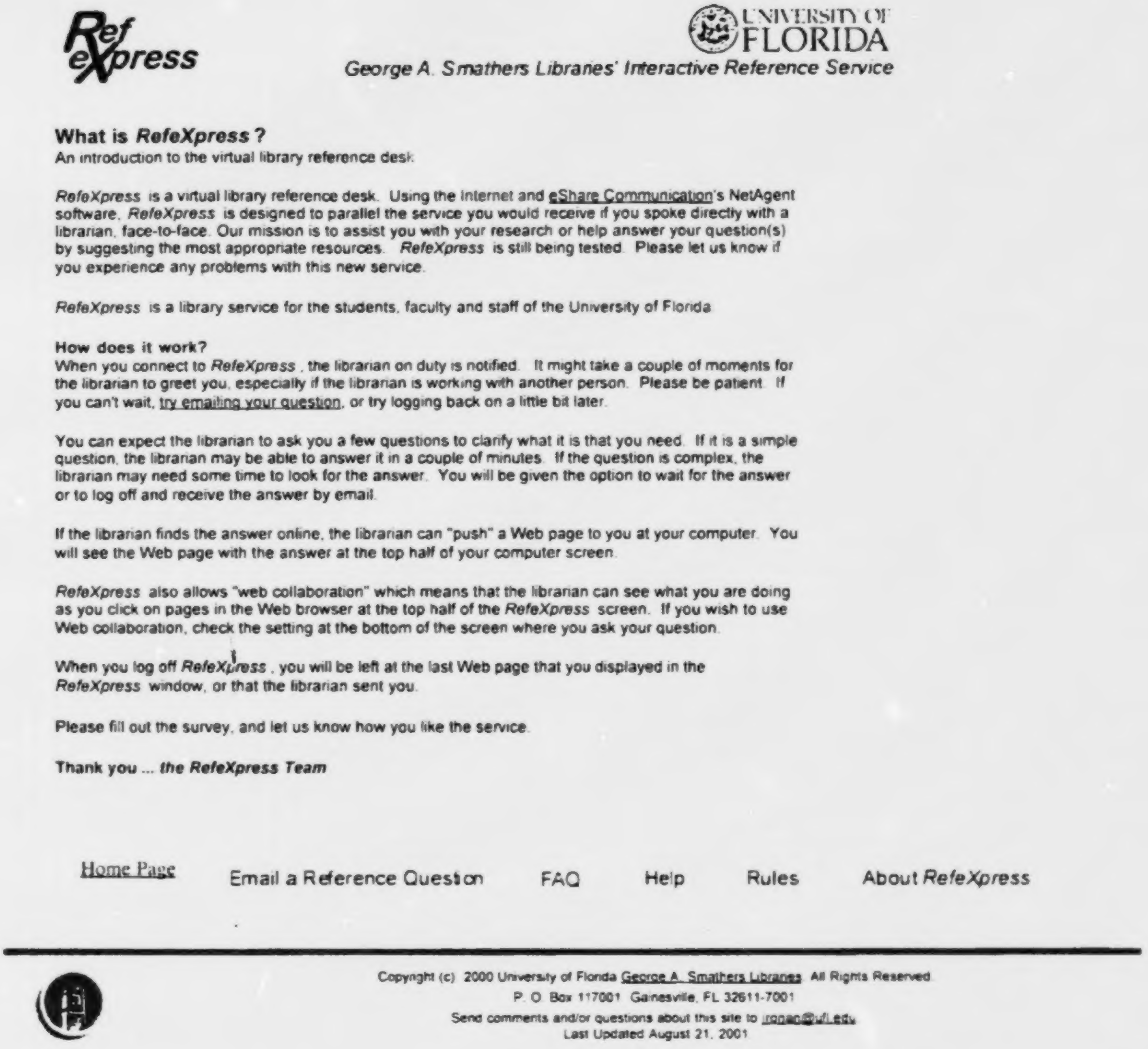
P. O. Box 117001 Gainesville, FL 32611-7001
Send comments and/or questions about this site to jronan@ufl.edu
Last Updated September 4, 2002

UNIVERSITY OF FLORIDA

http://refexpress.uflib.ufl.edu/rxabout.html



George A. Smathers Libraries' Interactive Reference Service

What is *RefeXpress*?

An introduction to the virtual library reference desk.

RefeXpress is a virtual library reference desk. Using the Internet and eShare Communication's NetAgent software, *RefeXpress* is designed to parallel the service you would receive if you spoke directly with a librarian, face-to-face. Our mission is to assist you with your research or help answer your question(s) by suggesting the most appropriate resources. *RefeXpress* is still being tested. Please let us know if you experience any problems with this new service.

RefeXpress is a library service for the students, faculty and staff of the University of Florida.

How does it work?

When you connect to *RefeXpress*, the librarian on duty is notified. It might take a couple of moments for the librarian to greet you, especially if the librarian is working with another person. Please be patient. If you can't wait, try emailing your question, or try logging back on a little bit later.

You can expect the librarian to ask you a few questions to clarify what it is that you need. If it is a simple question, the librarian may be able to answer it in a couple of minutes. If the question is complex, the librarian may need some time to look for the answer. You will be given the option to wait for the answer or to log off and receive the answer by email.

If the librarian finds the answer online, the librarian can "push" a Web page to you at your computer. You will see the Web page with the answer at the top half of your computer screen.

RefeXpress also allows "web collaboration" which means that the librarian can see what you are doing as you click on pages in the Web browser at the top half of the *RefeXpress* screen. If you wish to use Web collaboration, check the setting at the bottom of the screen where you ask your question.

When you log off *RefeXpress*, you will be left at the last Web page that you displayed in the *RefeXpress* window, or that the librarian sent you.

Please fill out the survey, and let us know how you like the service.

Thank you ... *the RefeXpress Team*

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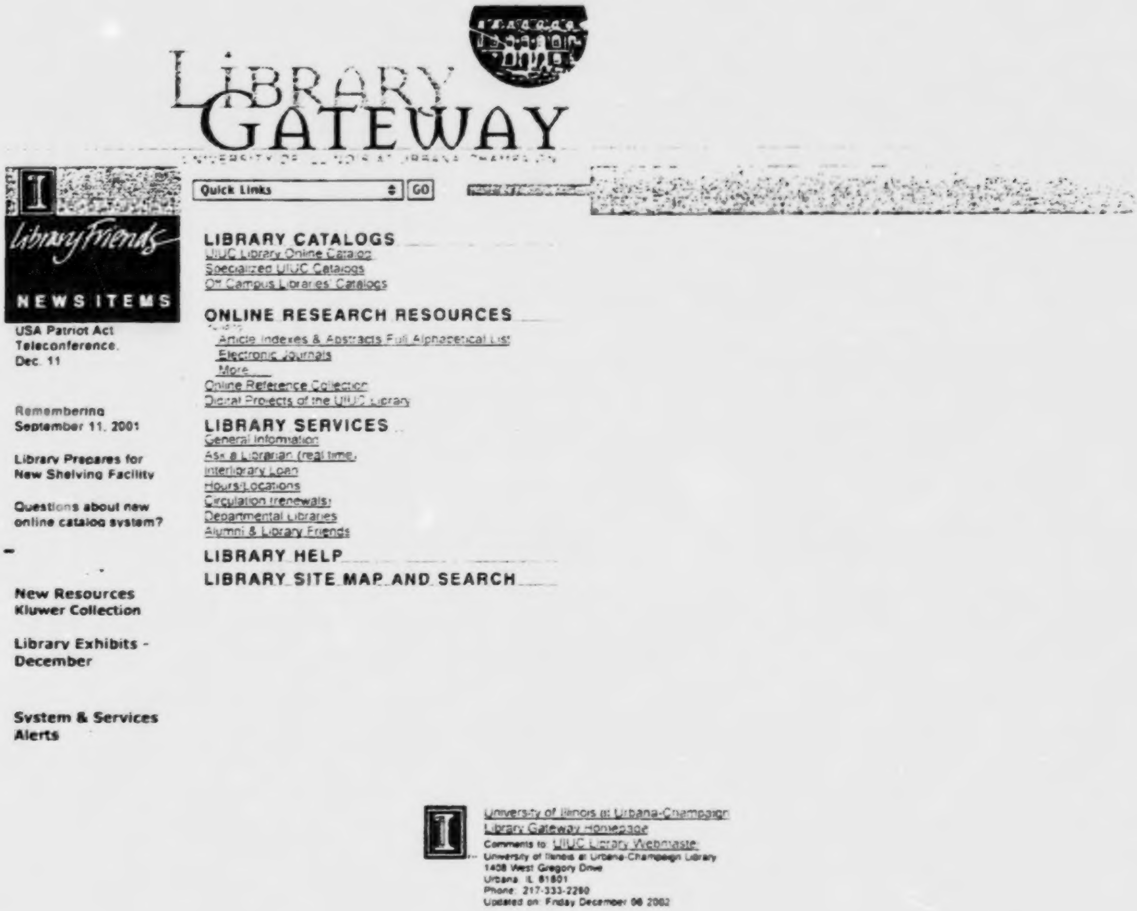
P. O. Box 117001 Gainesville, FL 32611-7001

Send comments and/or questions about this site to jronan@ufl.edu

Last Updated August 21, 2001

UNIVERSITY OF ILLINOIS AT URBANA-CHAMPAIGN

http://www.library.uiuc.edu/index.html



LIBRARY GATEWAY

UNIVERSITY OF ILLINOIS AT URBANA-CHAMPAIGN

NEWS ITEMS

USA Patriot Act Teleconference, Dec. 11

Remembering September 11, 2001

Library Prepares for New Shelving Facility

Questions about new online catalog system?

New Resources Kluwer Collection

Library Exhibits - December

System & Services Alerts

LIBRARY CATALOGS
UIUC Library Online Catalog
Specialized UIUC Catalogs
Off Campus Libraries' Catalogs

ONLINE RESEARCH RESOURCES
Article Indexes & Abstracts Full Alphabetical List
Electronic Journals
More...
Online Reference Collection
Digital Projects of the UIUC Library

LIBRARY SERVICES
General Information
Ask a Librarian (real time)
Interlibrary Loan
Hours/Locations
Circulation (renewals)
Departmental Libraries
Alumni & Library Friends

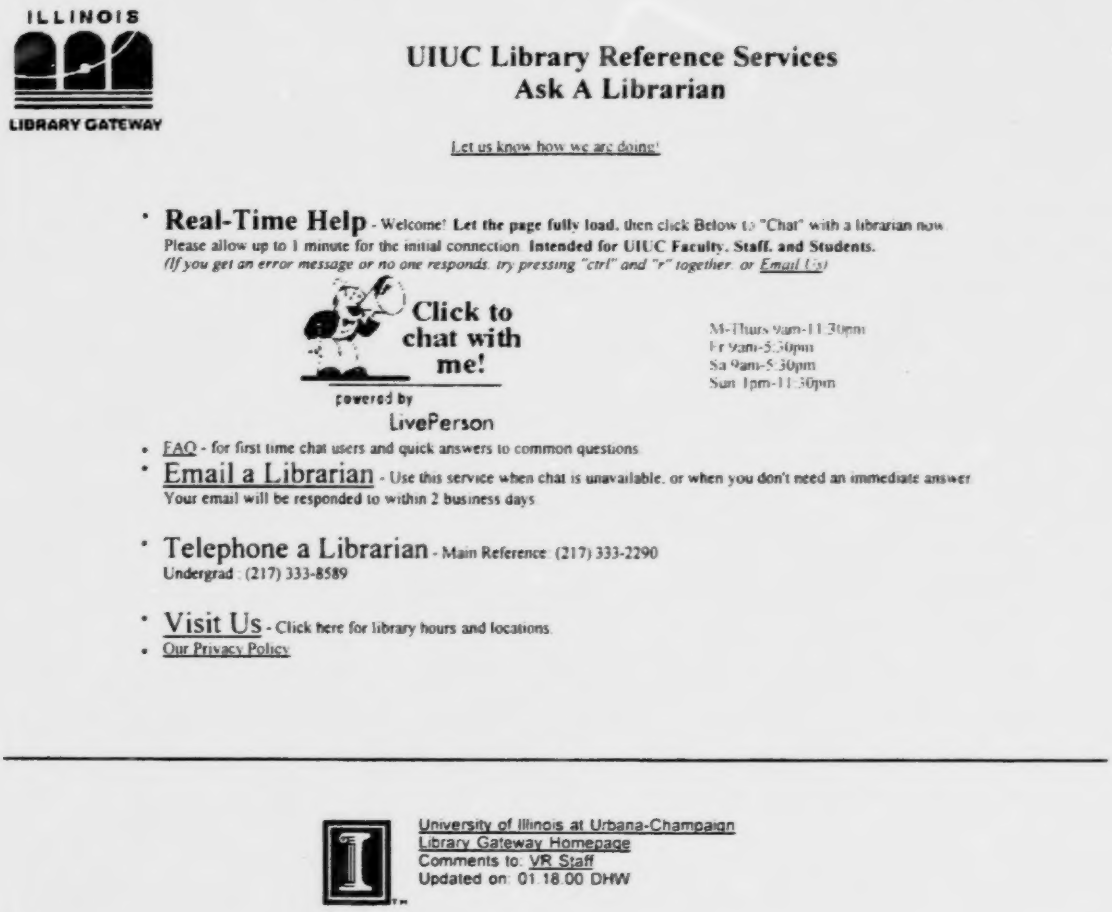
LIBRARY HELP

LIBRARY SITE MAP AND SEARCH

University of Illinois at Urbana-Champaign
Library Gateway Homepage
Comments to: UIUC Library Webmaster
University of Illinois at Urbana-Champaign Library
1408 West Gregory Drive
Urbana, IL 61801
Phone: 217-333-2290
Updated on: Friday December 06 2002

UNIVERSITY OF ILLINOIS AT URBANA-CHAMPAIGN

http://www.library.uiuc.edu/ugl/vr/



UIUC Library Reference Services
Ask A Librarian

Let us know how we are doing!

- **Real-Time Help** - Welcome! **Let the page fully load.** then click Below to "Chat" with a librarian now. Please allow up to 1 minute for the initial connection. **Intended for UIUC Faculty, Staff, and Students.** *(If you get an error message or no one responds, try pressing "ctrl" and "r" together, or Email Us)*

M-Thurs 9am-11:30pm
Fr 9am-5:30pm
Sa 9am-5:30pm
Sun 1pm-11:30pm

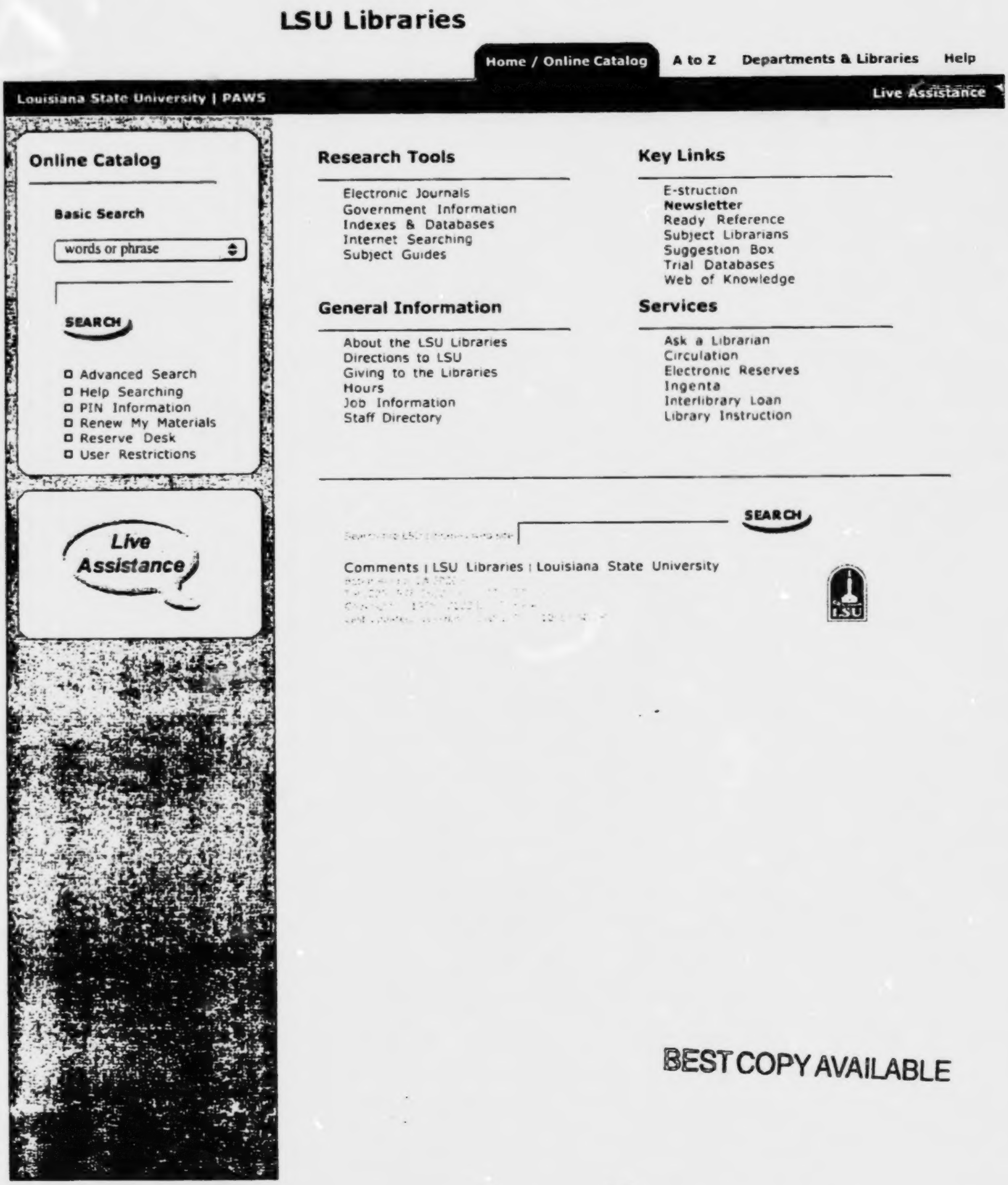
- FAQ - for first time chat users and quick answers to common questions
- Email a Librarian - Use this service when chat is unavailable, or when you don't need an immediate answer. Your email will be responded to within 2 business days
- Telephone a Librarian - Main Reference: (217) 333-2290 Undergrad : (217) 333-8589
- Visit Us - Click here for library hours and locations
- Our Privacy Policy

University of Illinois at Urbana-Champaign
Library Gateway Homepage
Comments to: VR Staff
Updated on: 01.18.00 DHW

47

LOUISIANA STATE UNIVERSITY

http://www.lib.lsu.edu/



LSU Libraries

Home / Online Catalog | A to Z | Departments & Libraries | Help

Louisiana State University | PAWS

Live Assistance

Online Catalog

Basic Search

words or phrase

SEARCH

- ☐ Advanced Search
- ☐ Help Searching
- ☐ PIN Information
- ☐ Renew My Materials
- ☐ Reserve Desk
- ☐ User Restrictions

Live Assistance

Research Tools

- Electronic Journals
- Government Information
- Indexes & Databases
- Internet Searching
- Subject Guides

General Information

- About the LSU Libraries
- Directions to LSU
- Giving to the Libraries
- Hours
- Job Information
- Staff Directory

Key Links

- E-struction
- **Newsletter**
- Ready Reference
- Subject Librarians
- Suggestion Box
- Trial Databases
- Web of Knowledge

Services

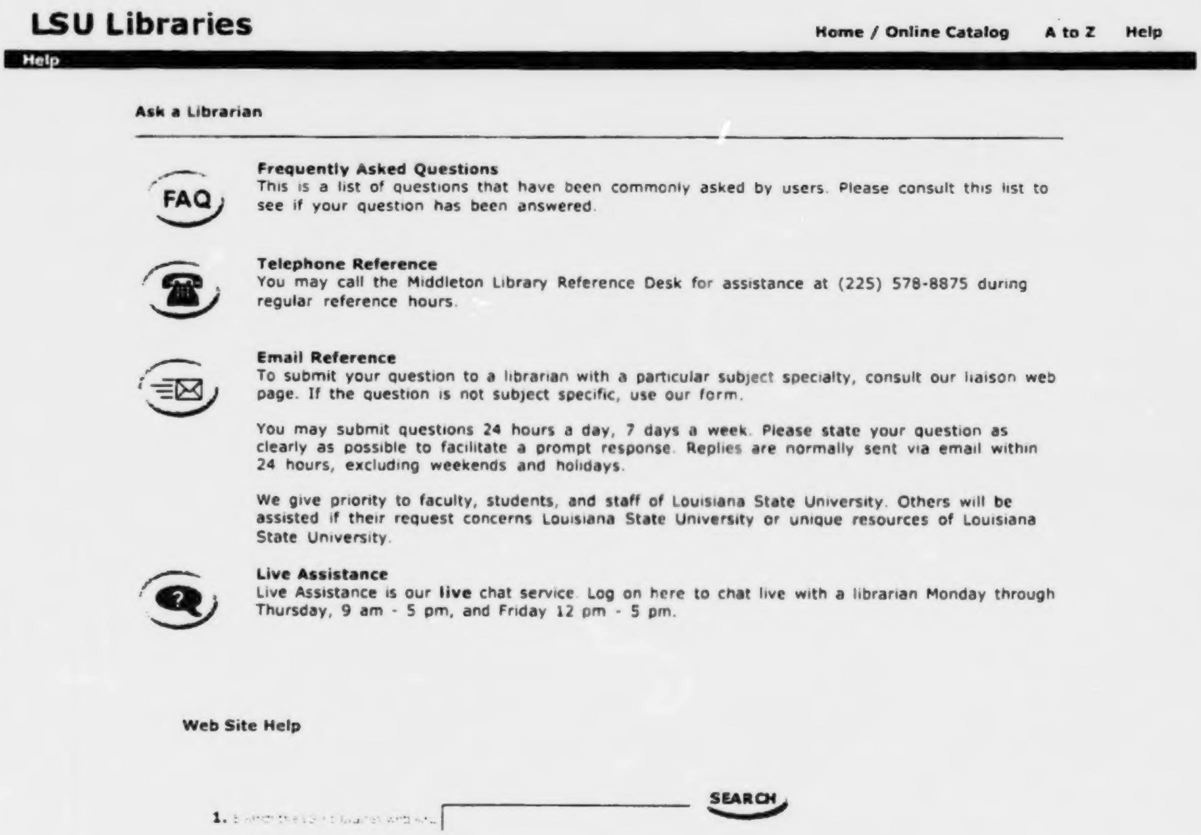
- Ask a Librarian
- Circulation
- Electronic Reserves
- Ingenta
- Interlibrary Loan
- Library Instruction

SEARCH

Comments | LSU Libraries | Louisiana State University

LOUISIANA STATE UNIVERSITY

http://www.lib.lsu.edu/virtual/



Ask a Librarian

Frequently Asked Questions
This is a list of questions that have been commonly asked by users. Please consult this list to see if your question has been answered.

Telephone Reference
You may call the Middleton Library Reference Desk for assistance at (225) 578-8875 during regular reference hours.

Email Reference
To submit your question to a librarian with a particular subject specialty, consult our liaison web page. If the question is not subject specific, use our form.

You may submit questions 24 hours a day, 7 days a week. Please state your question as clearly as possible to facilitate a prompt response. Replies are normally sent via email within 24 hours, excluding weekends and holidays.

We give priority to faculty, students, and staff of Louisiana State University. Others will be assisted if their request concerns Louisiana State University or unique resources of Louisiana State University.

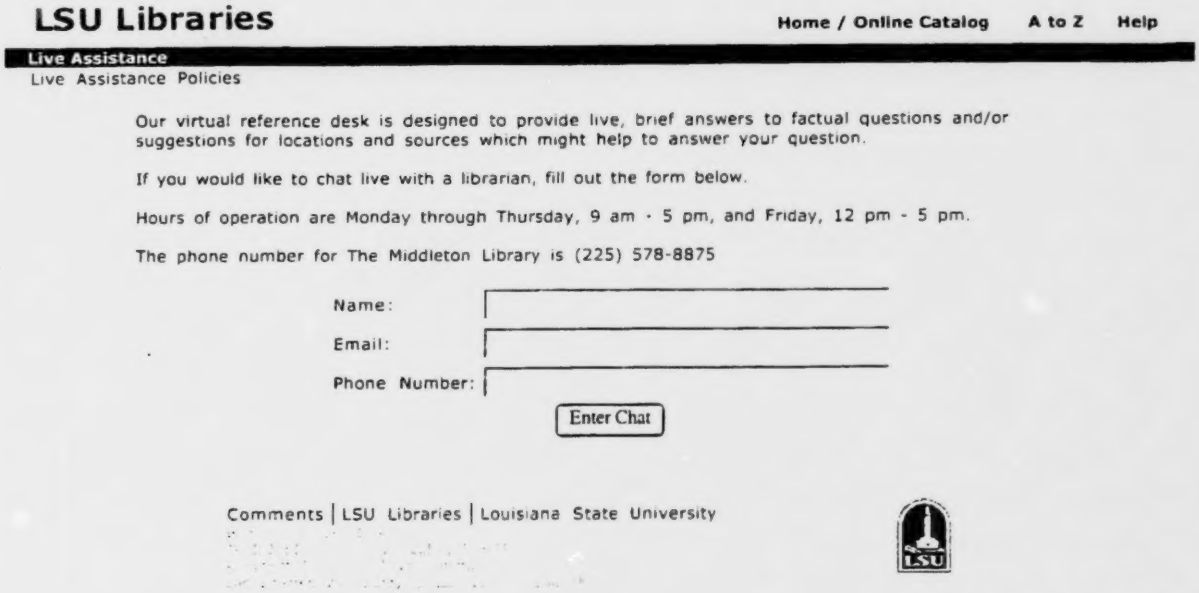
Live Assistance
Live Assistance is our **live** chat service. Log on here to chat live with a librarian Monday through Thursday, 9 am - 5 pm, and Friday 12 pm - 5 pm.

Web Site Help

1. [illegible]

LOUISIANA STATE UNIVERSITY

http://www.lib.lsu.edu/virtual/liveassistance.html



LSU Libraries

Home / Online Catalog
A to Z
Help
Live Assistance
Live Assistance Policies

Our virtual reference desk is designed to provide live, brief answers to factual questions and/or suggestions for locations and sources which might help to answer your question.

If you would like to chat live with a librarian, fill out the form below.

Hours of operation are Monday through Thursday, 9 am - 5 pm, and Friday, 12 pm - 5 pm.

The phone number for The Middleton Library is (225) 578-8875

Name:

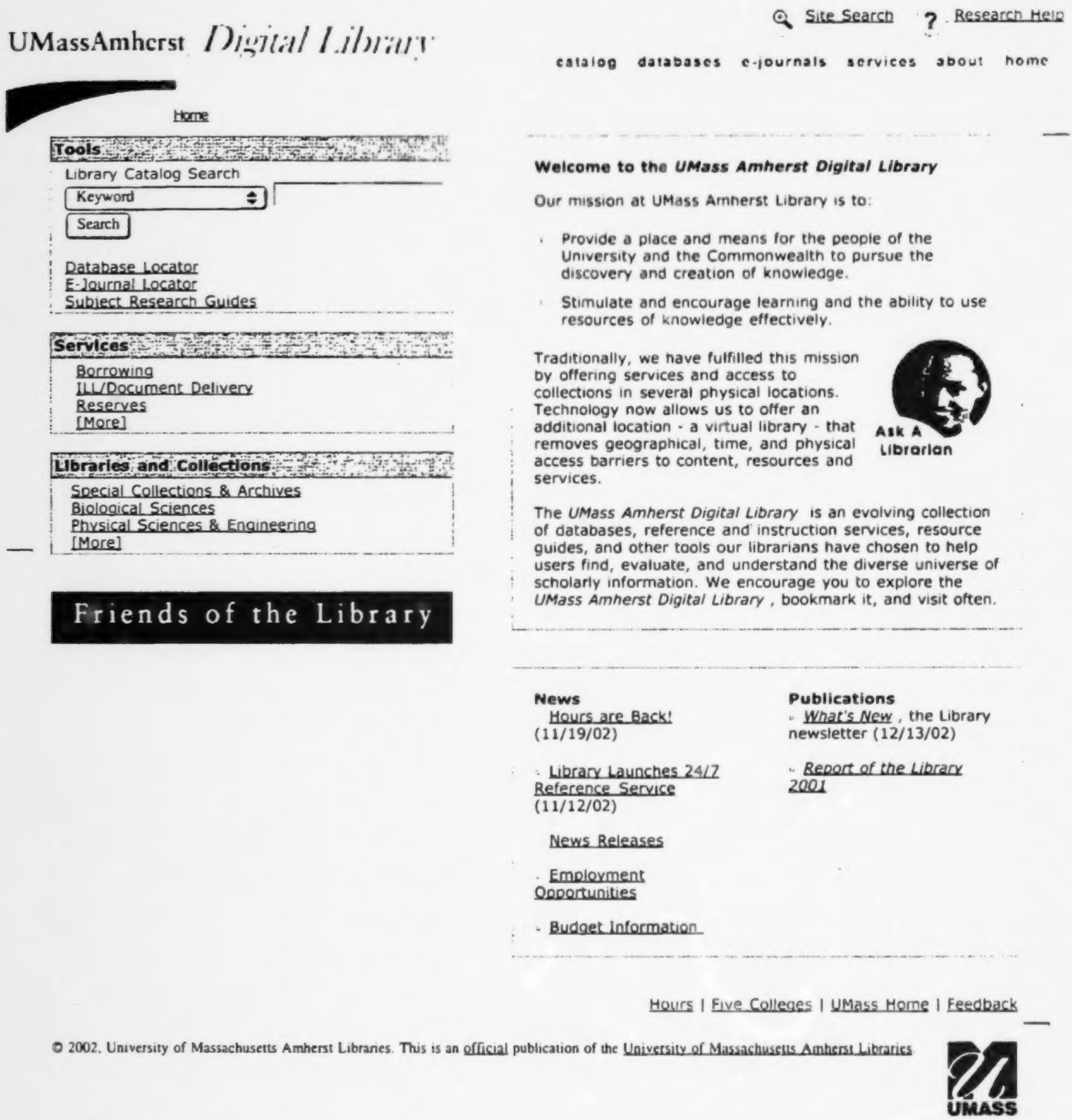
Email:

Phone Number:

Enter Chat
Comments | LSU Libraries | Louisiana State University
LSU

UNIVERSITY OF MASSACHUSETTS, AMHERST

http://www.library.umass.edu/


Site Search
Research Help
UMassAmherst Digital Library
catalog
databases
e-journals
services
about
home
Home
Tools
Library Catalog Search
Keyword
Search
Database Locator
E-Journal Locator
Subject Research Guides
Services
Borrowing
ILL/Document Delivery
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[More]
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UMASS

Welcome to the *UMass Amherst Digital Library*

Our mission at UMass Amherst Library is to:

- Provide a place and means for the people of the University and the Commonwealth to pursue the discovery and creation of knowledge.
- Stimulate and encourage learning and the ability to use resources of knowledge effectively.

Traditionally, we have fulfilled this mission by offering services and access to collections in several physical locations. Technology now allows us to offer an additional location - a virtual library - that removes geographical, time, and physical access barriers to content, resources and services.

The *UMass Amherst Digital Library* is an evolving collection of databases, reference and instruction services, resource guides, and other tools our librarians have chosen to help users find, evaluate, and understand the diverse universe of scholarly information. We encourage you to explore the *UMass Amherst Digital Library*, bookmark it, and visit often.

News

Hours are Back! (11/19/02)

- Library Launches 24/7 Reference Service (11/12/02)

News Releases

- Employment Opportunities
- Budget Information

Publications

- *What's New*, the Library newsletter (12/13/02)
- *Report of the Library 2001*

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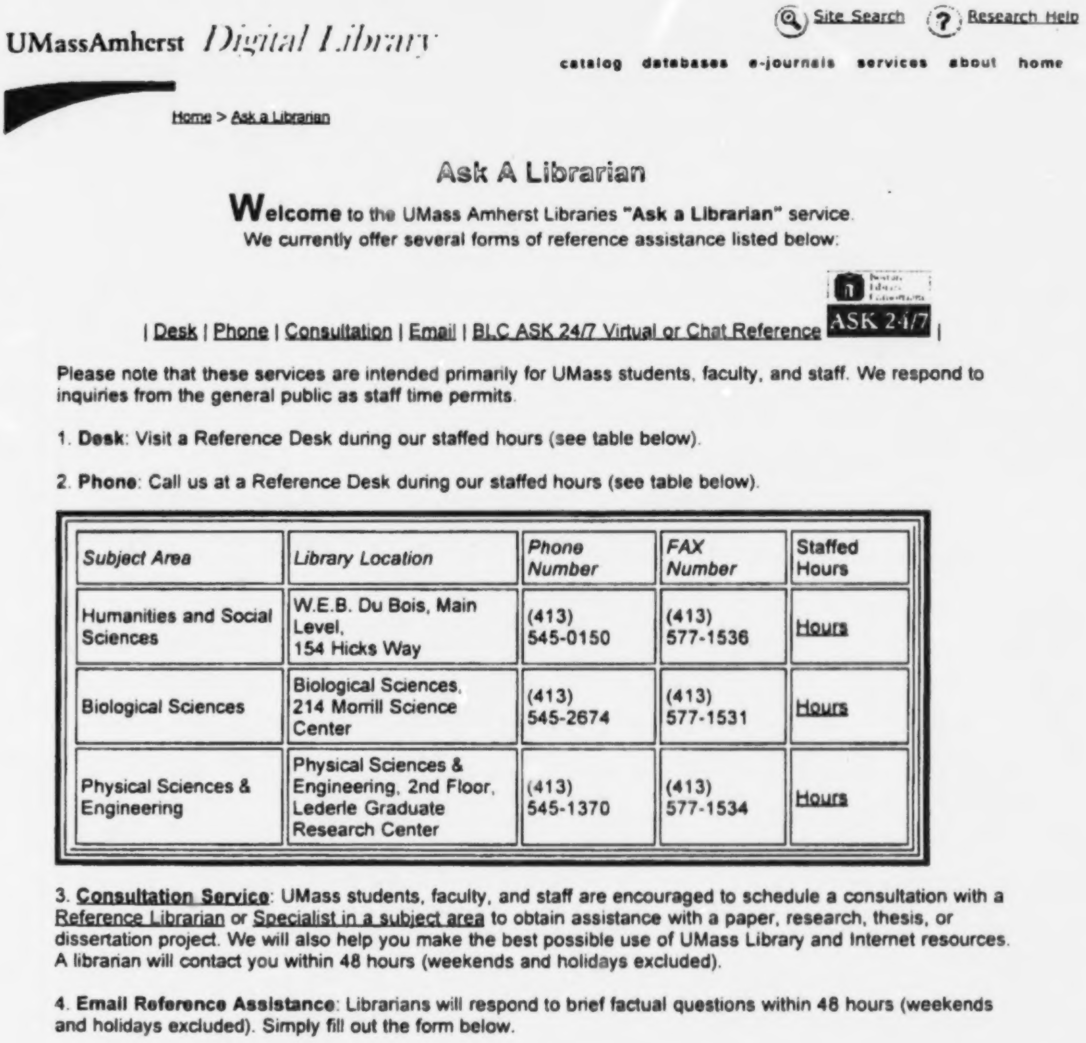
UNIVERSITY OF MASSACHUSETTS, AMHERST

http://www.library.umass.edu/ask/



UMassAmherst Digital Library
Site Search
Research Help
catalog databases e-journals services about home
Home > Ask a Librarian

Ask A Librarian

Welcome to the UMass Amherst Libraries **"Ask a Librarian"** service.
We currently offer several forms of reference assistance listed below:

| Desk | Phone | Consultation | Email | BLC ASK 24/7 Virtual or Chat Reference ASK 24/7 |

Please note that these services are intended primarily for UMass students, faculty, and staff. We respond to inquiries from the general public as staff time permits.

1. **Desk**: Visit a Reference Desk during our staffed hours (see table below).

2. **Phone**: Call us at a Reference Desk during our staffed hours (see table below).

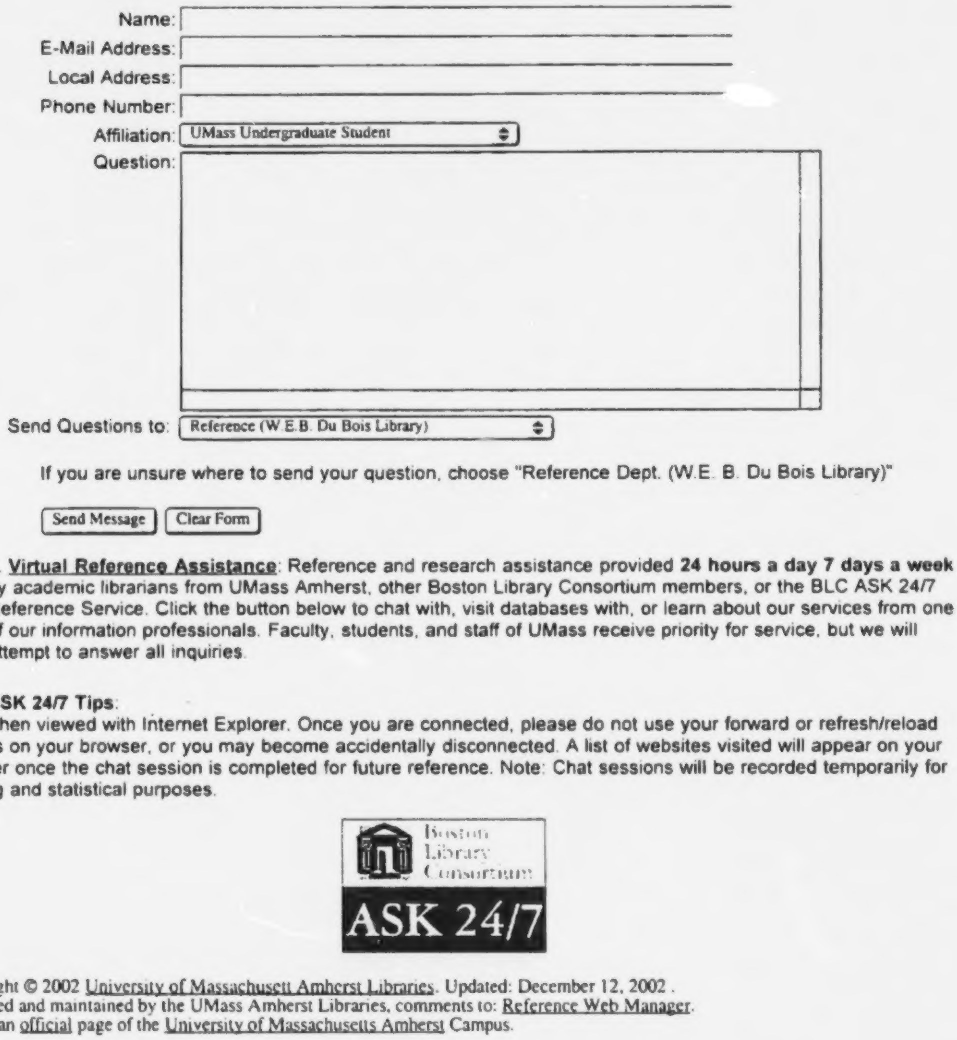
Subject Area	*Library Location*	*Phone Number*	*FAX Number*	Staffed Hours
Humanities and Social Sciences	W.E.B. Du Bois, Main Level, 154 Hicks Way	(413) 545-0150	(413) 577-1536	Hours
Biological Sciences	Biological Sciences, 214 Morrill Science Center	(413) 545-2674	(413) 577-1531	Hours
Physical Sciences & Engineering	Physical Sciences & Engineering, 2nd Floor, Lederle Graduate Research Center	(413) 545-1370	(413) 577-1534	Hours

3. **Consultation Service**: UMass students, faculty, and staff are encouraged to schedule a consultation with a Reference Librarian or Specialist in a subject area to obtain assistance with a paper, research, thesis, or dissertation project. We will also help you make the best possible use of UMass Library and Internet resources. A librarian will contact you within 48 hours (weekends and holidays excluded).

4. **Email Reference Assistance**: Librarians will respond to brief factual questions within 48 hours (weekends and holidays excluded). Simply fill out the form below.

UNIVERSITY OF MASSACHUSETTS, AMHERST

http://www.library.umass.edu/ask/



Name:

E-Mail Address:

Local Address:

Phone Number:

Affiliation: UMass Undergraduate Student

Question:

Send Questions to: Reference (W.E.B. Du Bois Library)

If you are unsure where to send your question, choose "Reference Dept. (W.E. B. Du Bois Library)"

5. **Virtual Reference Assistance**: Reference and research assistance provided **24 hours a day 7 days a week** by academic librarians from UMass Amherst, other Boston Library Consortium members, or the BLC ASK 24/7 Reference Service. Click the button below to chat with, visit databases with, or learn about our services from one of our information professionals. Faculty, students, and staff of UMass receive priority for service, but we will attempt to answer all inquiries.

BLC ASK 24/7 Tips:
Best when viewed with Internet Explorer. Once you are connected, please do not use your forward or refresh/reload buttons on your browser, or you may become accidentally disconnected. A list of websites visited will appear on your browser once the chat session is completed for future reference. Note: Chat sessions will be recorded temporarily for training and statistical purposes.

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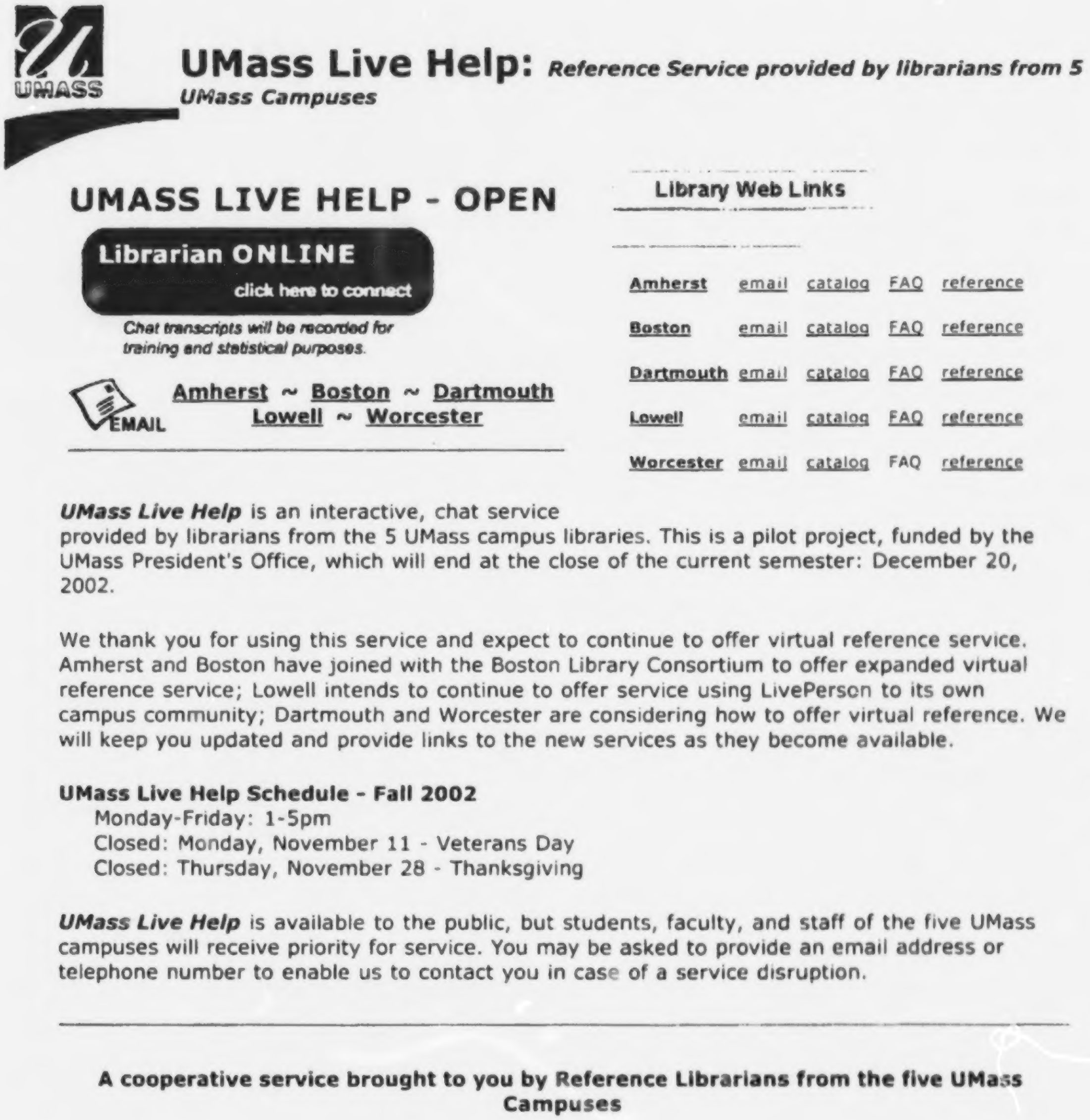
UNIVERSITY OF MASSACHUSETTS, AMHERST

http://www.lib.umb.edu/umass_livehelp/index.html



UMass Live Help: *Reference Service provided by librarians from 5 UMass Campuses*

UMASS LIVE HELP - OPEN

Librarian ONLINE
click here to connect

Chat transcripts will be recorded for training and statistical purposes.

EMAIL **Amherst** ~ **Boston** ~ **Dartmouth**
Lowell ~ **Worcester**

Library Web Links

Amherst	email	catalog	FAQ	reference
Boston	email	catalog	FAQ	reference
Dartmouth	email	catalog	FAQ	reference
Lowell	email	catalog	FAQ	reference
Worcester	email	catalog	FAQ	reference

UMass Live Help is an interactive, chat service provided by librarians from the 5 UMass campus libraries. This is a pilot project, funded by the UMass President's Office, which will end at the close of the current semester: December 20, 2002.

We thank you for using this service and expect to continue to offer virtual reference service. Amherst and Boston have joined with the Boston Library Consortium to offer expanded virtual reference service; Lowell intends to continue to offer service using LivePerson to its own campus community; Dartmouth and Worcester are considering how to offer virtual reference. We will keep you updated and provide links to the new services as they become available.

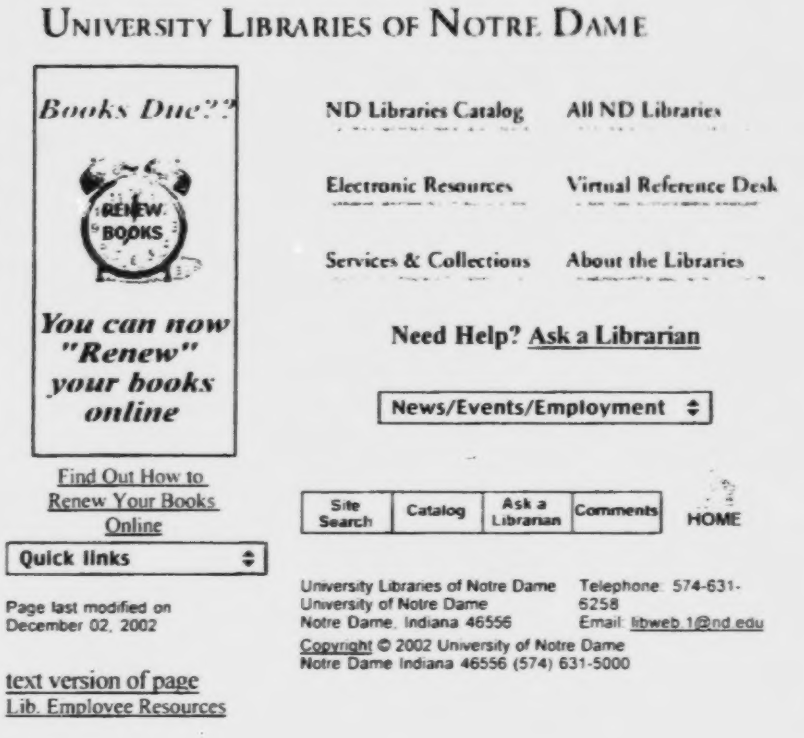
UMass Live Help Schedule - Fall 2002
Monday-Friday: 1-5pm
Closed: Monday, November 11 - Veterans Day
Closed: Thursday, November 28 - Thanksgiving

UMass Live Help is available to the public, but students, faculty, and staff of the five UMass campuses will receive priority for service. You may be asked to provide an email address or telephone number to enable us to contact you in case of a service disruption.

A cooperative service brought to you by Reference Librarians from the five UMass Campuses

UNIVERSITY OF NOTRE DAME

http://www.nd.edu/~ndlibs/



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University of Notre Dame
Notre Dame, Indiana 46556

Telephone: 574-631-6258
Email: libweb.1@nd.edu

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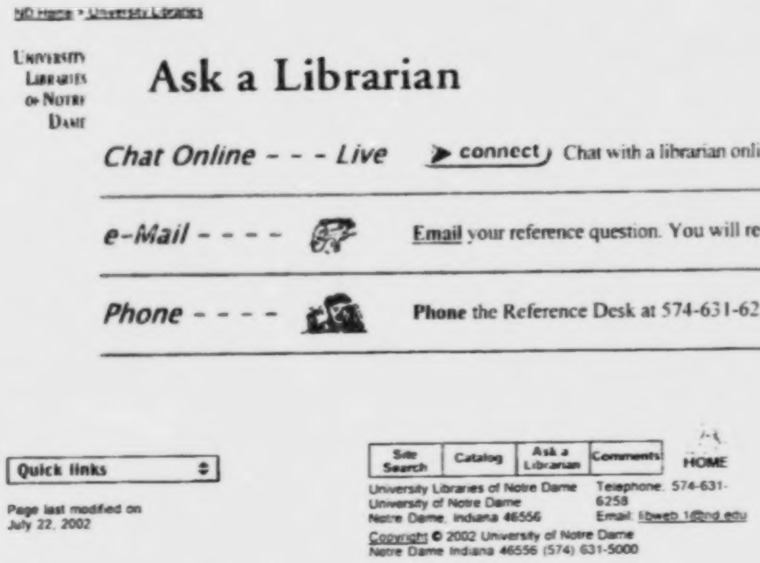
UNIVERSITY OF NOTRE DAME

http://asklib.nd.edu/



ND Home > University Libraries

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Ask a Librarian

Chat Online - - - Live **connect** Chat with a librarian online.

e-Mail - - - - Email your reference question. You will receive a response as soon as possible.

Phone - - - - **Phone** the Reference Desk at 574-631-6258 Hours

Quick links

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July 22, 2002

University Libraries of Notre Dame
University of Notre Dame
Notre Dame, Indiana 46556

Telephone: 574-631-6258
Email: libweb 1@nd.edu

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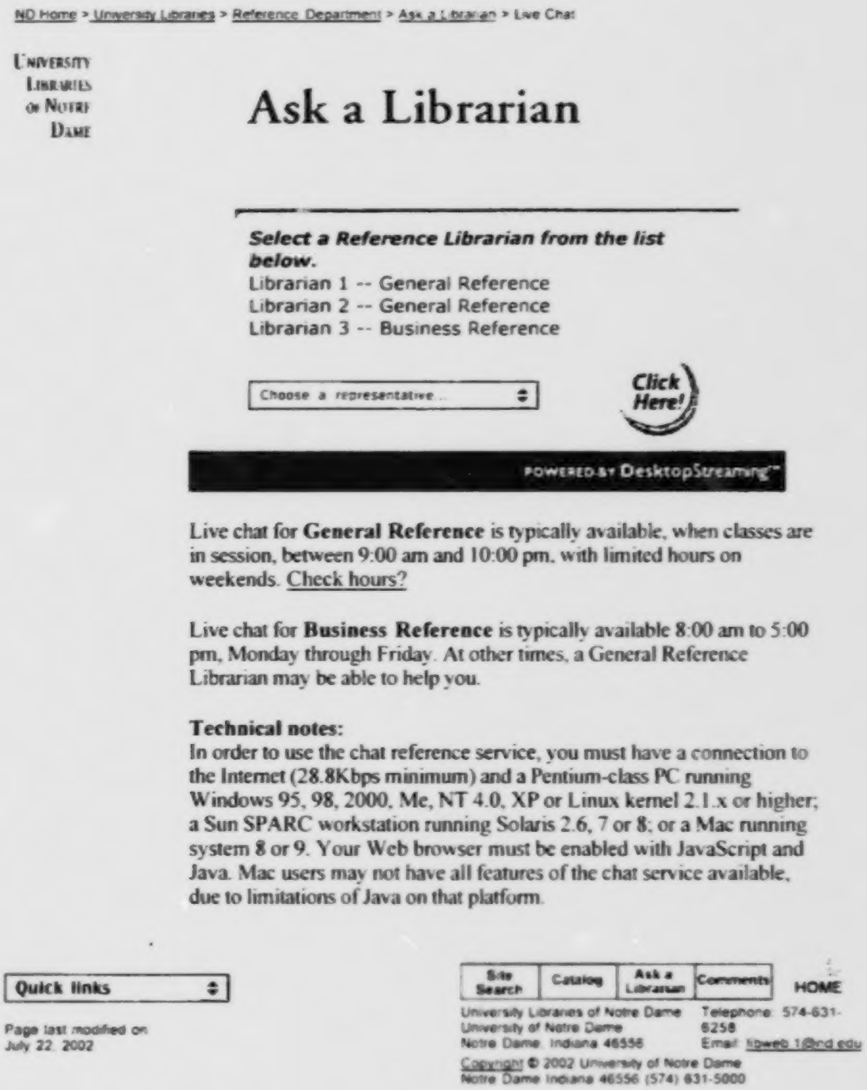
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Ask a Librarian

Select a Reference Librarian from the list below.

Librarian 1 -- General Reference
Librarian 2 -- General Reference
Librarian 3 -- Business Reference

Live chat for **General Reference** is typically available, when classes are in session, between 9:00 am and 10:00 pm, with limited hours on weekends. Check hours?

Live chat for **Business Reference** is typically available 8:00 am to 5:00 pm, Monday through Friday. At other times, a General Reference Librarian may be able to help you.

Technical notes:
In order to use the chat reference service, you must have a connection to the Internet (28.8Kbps minimum) and a Pentium-class PC running Windows 95, 98, 2000, Me, NT 4.0, XP or Linux kernel 2.1.x or higher; a Sun SPARC workstation running Solaris 2.6, 7 or 8; or a Mac running system 8 or 9. Your Web browser must be enabled with JavaScript and Java. Mac users may not have all features of the chat service available, due to limitations of Java on that platform.

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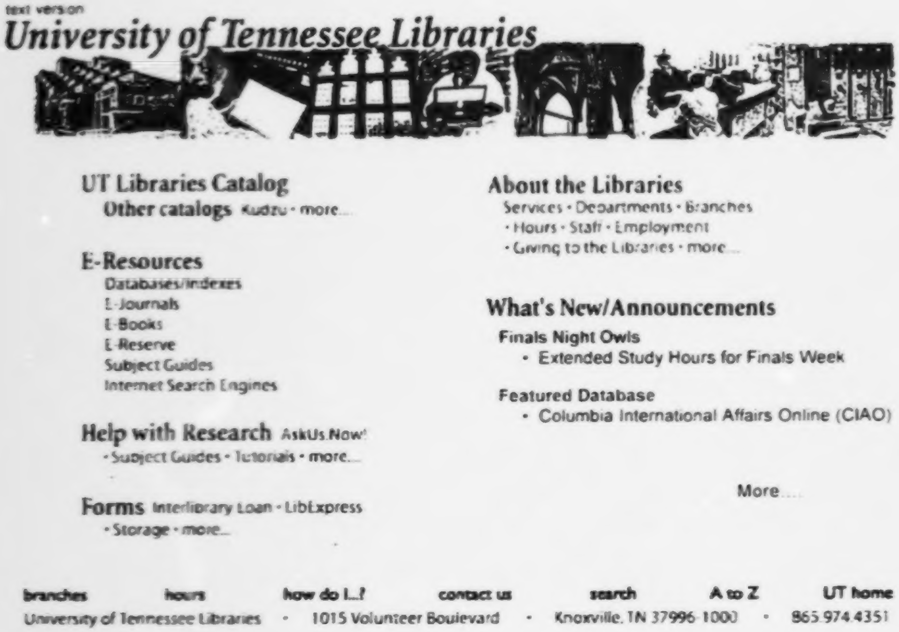
UNIVERSITY OF TENNESSEE

http://www.lib.utk.edu/



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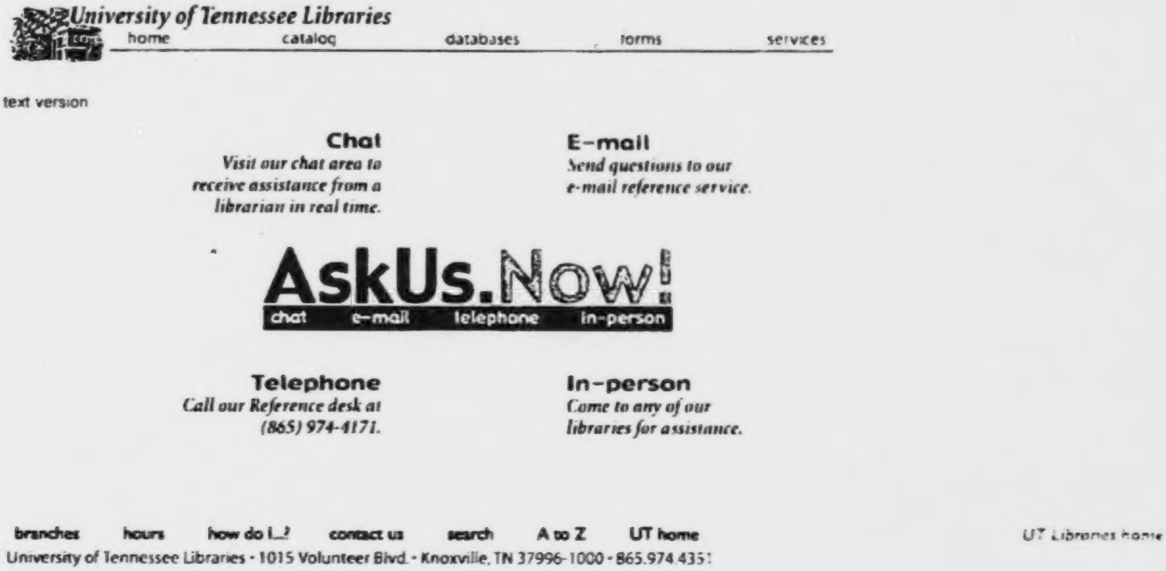
http://www.lib.utk.edu/refs/askusnow/



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home catalog databases forms services

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Chat
Visit our chat area to receive assistance from a librarian in real time.

E-mail
Send questions to our e-mail reference service.

AskUs.Now!

chat e-mail telephone in-person

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In-person
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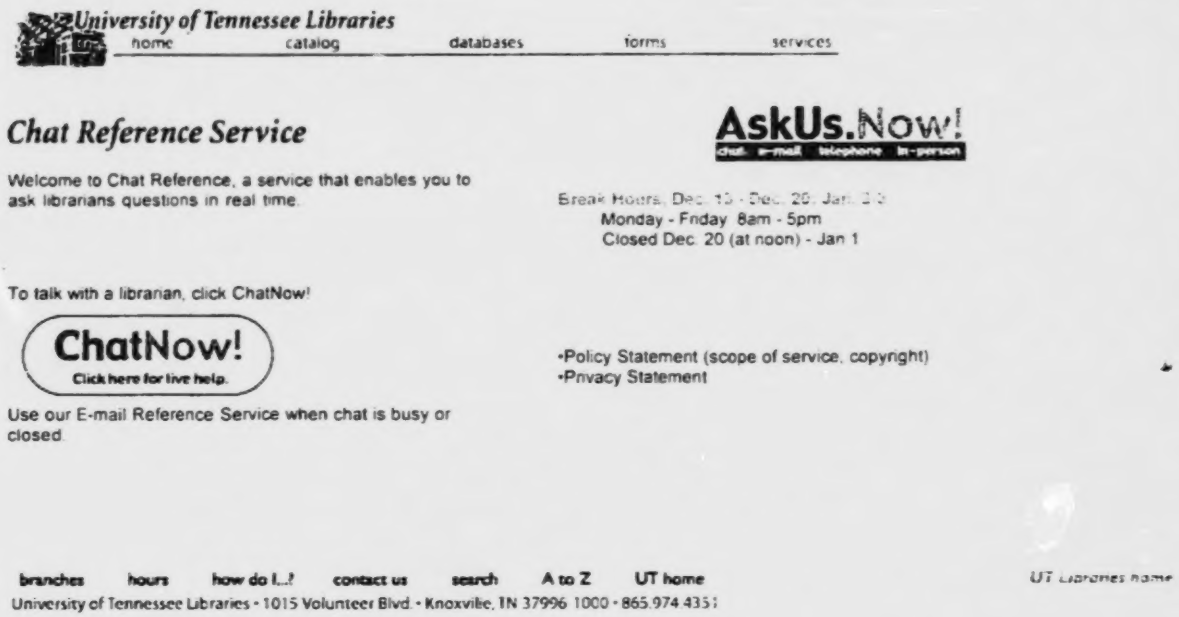

University of Tennessee Libraries

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Chat Reference Service

Welcome to Chat Reference, a service that enables you to ask librarians questions in real time.

To talk with a librarian, click ChatNow!

ChatNow!
Click here for live help.

Use our E-mail Reference Service when chat is busy or closed.

AskUs.Now!
chat e-mail telephone in-person

Break Hours, Dec. 13 - Dec. 20; Jan. 2-3
Monday - Friday 8am - 5pm
Closed Dec. 20 (at noon) - Jan 1

- Policy Statement (scope of service, copyright)
- Privacy Statement

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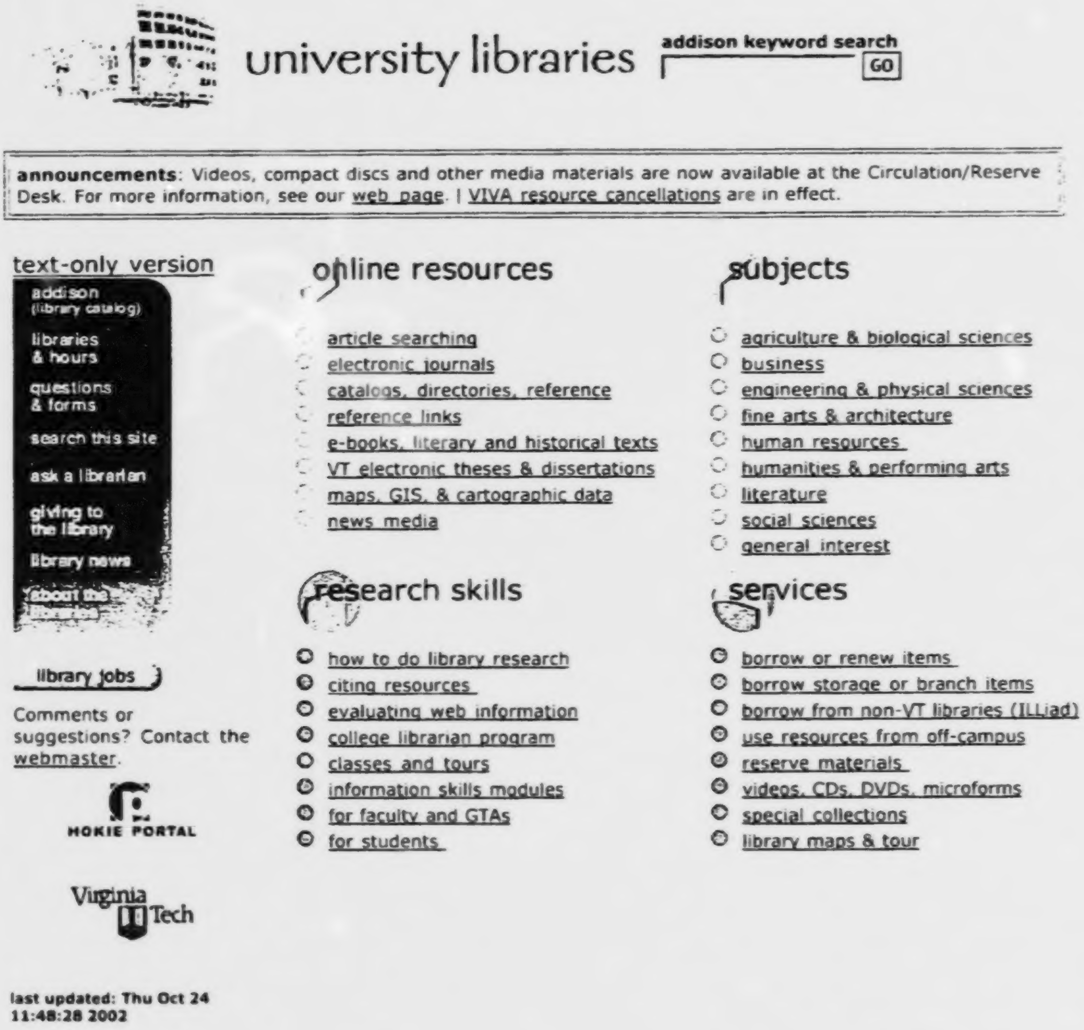
http://www.lib.vt.edu/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- general interest

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- citing resources
- evaluating web information
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- for faculty and GTAs
- for students

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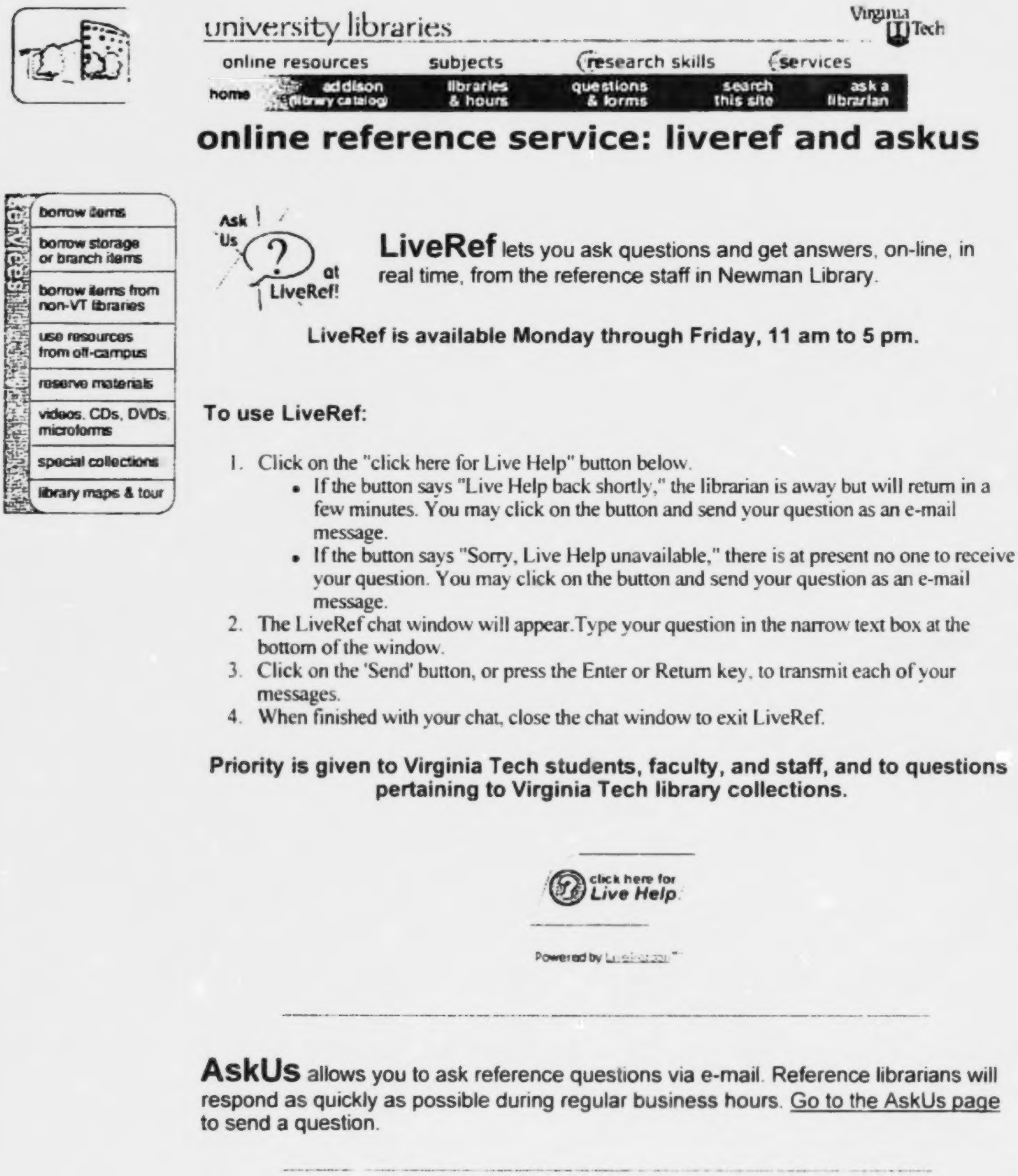
- borrow storage or branch items
- borrow from non-VT libraries (ILLiad)
- use resources from off-campus
- reserve materials
- videos, CDs, DVDs, microforms
- special collections
- library maps & tour

Comments or suggestions? Contact the webmaster.

last updated: Thu Oct 24 11:48:28 2002

VIRGINIA TECH

http://www.lib.vt.edu/services/liveref.html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ask a librarian
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borrow storage or branch items
borrow items from non-VT libraries
use resources from off-campus
reserve materials
videos, CDs, DVDs, microforms
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library maps & tour
Ask Us at LiveRef!
click here for Live Help
Powered by

online reference service: liveref and askus

LiveRef lets you ask questions and get answers, on-line, in real time, from the reference staff in Newman Library.

LiveRef is available Monday through Friday, 11 am to 5 pm.

To use LiveRef:

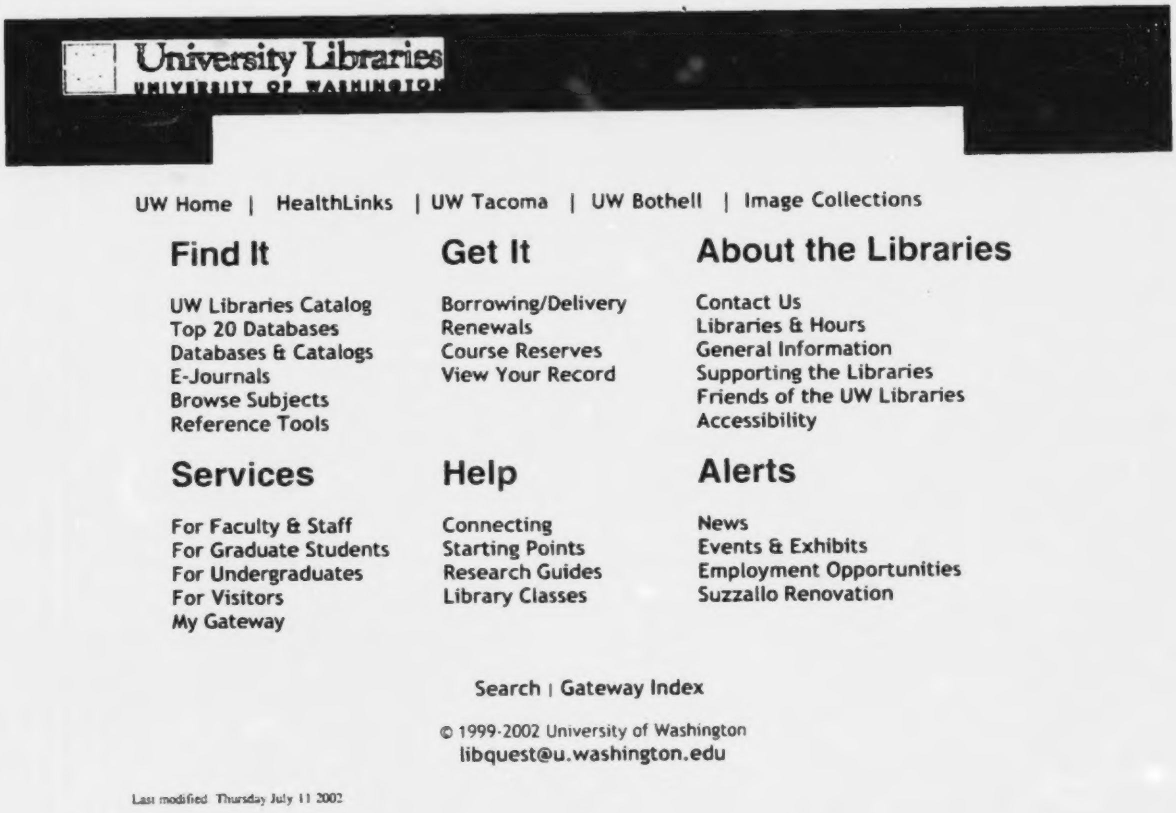
1. Click on the "click here for Live Help" button below.
    - If the button says "Live Help back shortly," the librarian is away but will return in a few minutes. You may click on the button and send your question as an e-mail message.
    - If the button says "Sorry, Live Help unavailable," there is at present no one to receive your question. You may click on the button and send your question as an e-mail message.
2. The LiveRef chat window will appear.Type your question in the narrow text box at the bottom of the window.
3. Click on the 'Send' button, or press the Enter or Return key, to transmit each of your messages.
4. When finished with your chat, close the chat window to exit LiveRef.

Priority is given to Virginia Tech students, faculty, and staff, and to questions pertaining to Virginia Tech library collections.

AskUs allows you to ask reference questions via e-mail. Reference librarians will respond as quickly as possible during regular business hours. Go to the AskUs page to send a question.

UNIVERSITY OF WASHINGTON

http://www.lib.washington.edu/



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About the Libraries

Contact Us
Libraries & Hours
General Information
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Services

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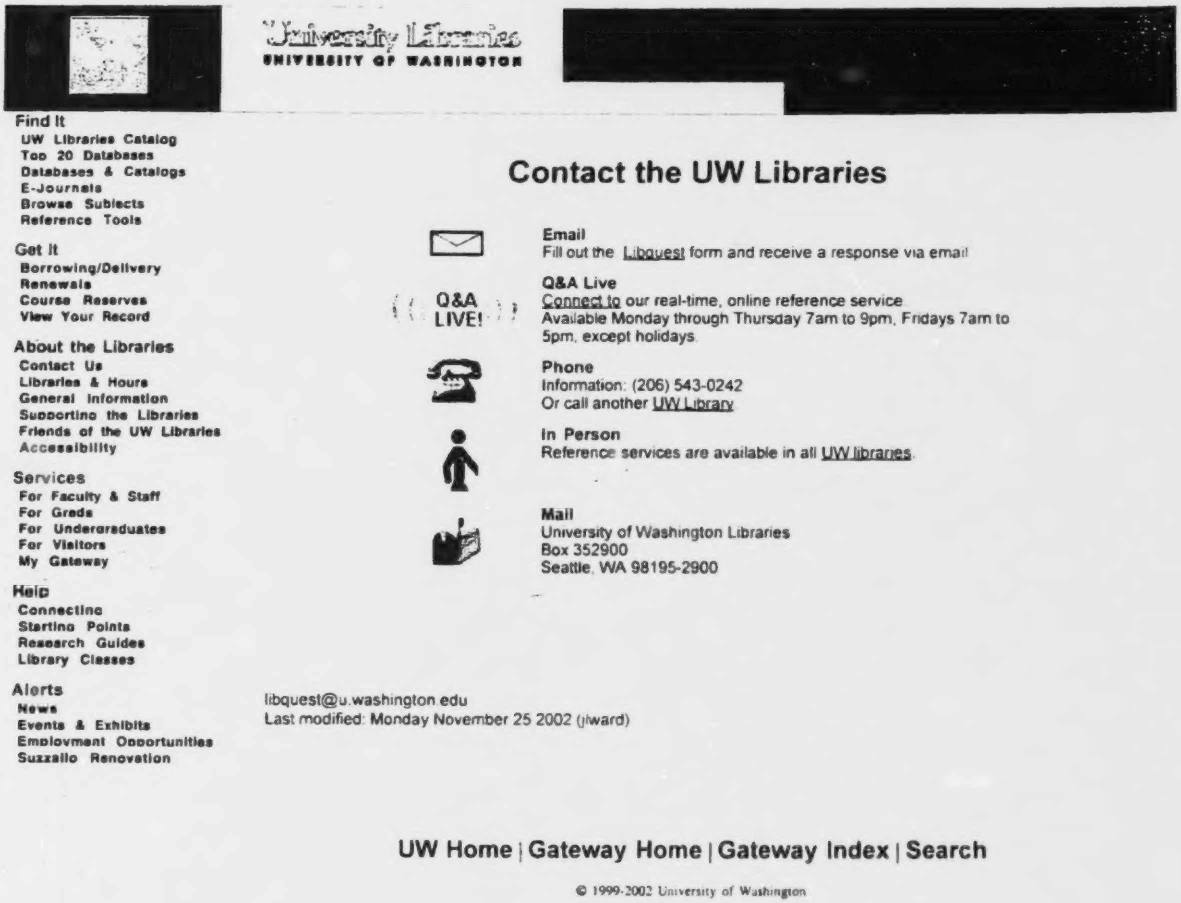

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- For Faculty & Staff
- For Grads
- For Undergraduates
- For Visitors
- My Gateway

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- Connecting
- Starting Points
- Research Guides
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Contact the UW Libraries

Email
Fill out the Libquest form and receive a response via email

Q&A LIVE!

Q&A Live
Connect to our real-time, online reference service
Available Monday through Thursday 7am to 9pm, Fridays 7am to 5pm, except holidays.

Phone
Information: (206) 543-0242
Or call another UW Library

In Person
Reference services are available in all UW libraries.

Mail
University of Washington Libraries
Box 352900
Seattle, WA 98195-2900

libquest@u.washington.edu
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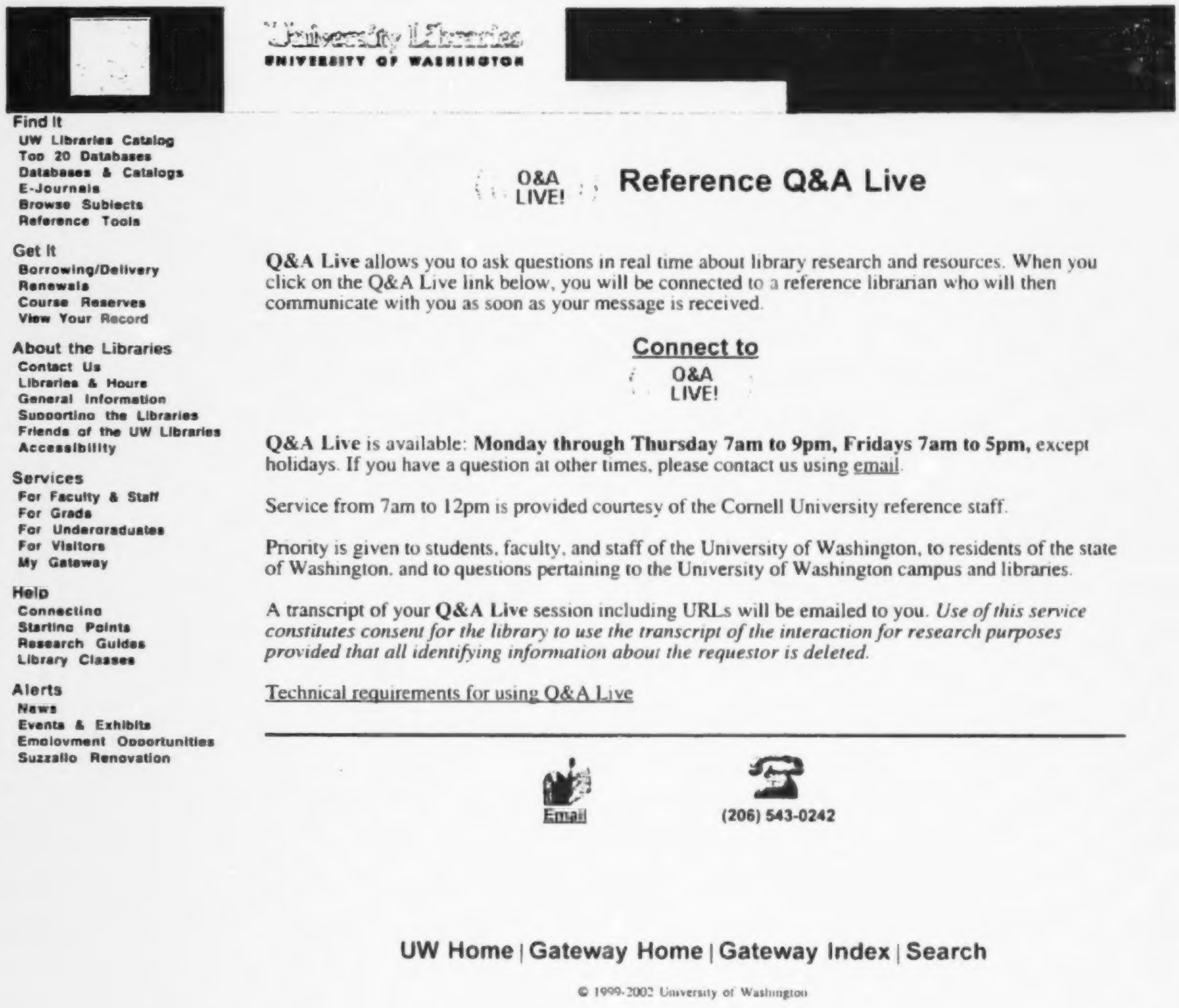
http://www.lib.washington.edu/services/qnalive/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Renewals
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Libraries & Hours
General Information
Supporting the Libraries
Friends of the UW Libraries
Accessibility
Services
For Faculty & Staff
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Connecting
Starting Points
Research Guides
Library Classes
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Q&A LIVE!

Reference Q&A Live

Q&A Live allows you to ask questions in real time about library research and resources. When you click on the Q&A Live link below, you will be connected to a reference librarian who will then communicate with you as soon as your message is received.

Connect to
Q&A LIVE!

Q&A Live is available: **Monday through Thursday 7am to 9pm, Fridays 7am to 5pm,** except holidays. If you have a question at other times, please contact us using email.

Service from 7am to 12pm is provided courtesy of the Cornell University reference staff.

Priority is given to students, faculty, and staff of the University of Washington, to residents of the state of Washington, and to questions pertaining to the University of Washington campus and libraries.

A transcript of your **Q&A Live** session including URLs will be emailed to you. *Use of this service constitutes consent for the library to use the transcript of the interaction for research purposes provided that all identifying information about the requestor is deleted.*

Technical requirements for using Q&A Live

Email

(206) 543-0242

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Policies and Guidelines

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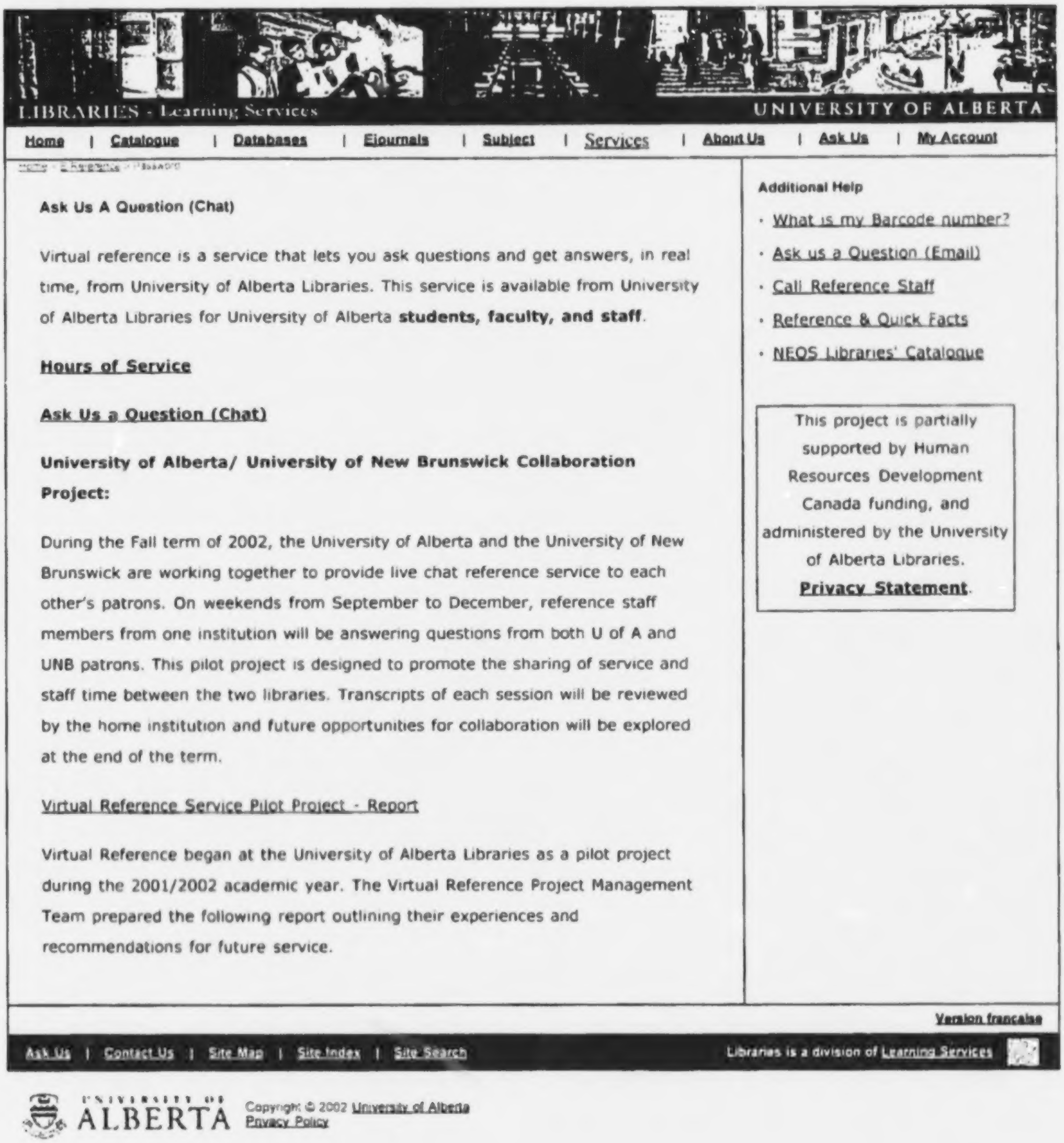
http://www.library.ualberta.ca/ereference/codeverifier/index.cfm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Home > E-Reference > Password

Ask Us A Question (Chat)

Virtual reference is a service that lets you ask questions and get answers, in real time, from University of Alberta Libraries. This service is available from University of Alberta Libraries for University of Alberta **students, faculty, and staff**.

Hours of Service

Ask Us a Question (Chat)

University of Alberta/ University of New Brunswick Collaboration Project:

During the Fall term of 2002, the University of Alberta and the University of New Brunswick are working together to provide live chat reference service to each other's patrons. On weekends from September to December, reference staff members from one institution will be answering questions from both U of A and UNB patrons. This pilot project is designed to promote the sharing of service and staff time between the two libraries. Transcripts of each session will be reviewed by the home institution and future opportunities for collaboration will be explored at the end of the term.

Virtual Reference Service Pilot Project - Report

Virtual Reference began at the University of Alberta Libraries as a pilot project during the 2001/2002 academic year. The Virtual Reference Project Management Team prepared the following report outlining their experiences and recommendations for future service.

Additional Help

- What is my Barcode number?
- Ask us a Question (Email)
- Call Reference Staff
- Reference & Quick Facts
- NEOS Libraries' Catalogue

This project is partially supported by Human Resources Development Canada funding, and administered by the University of Alberta Libraries. **Privacy Statement**.

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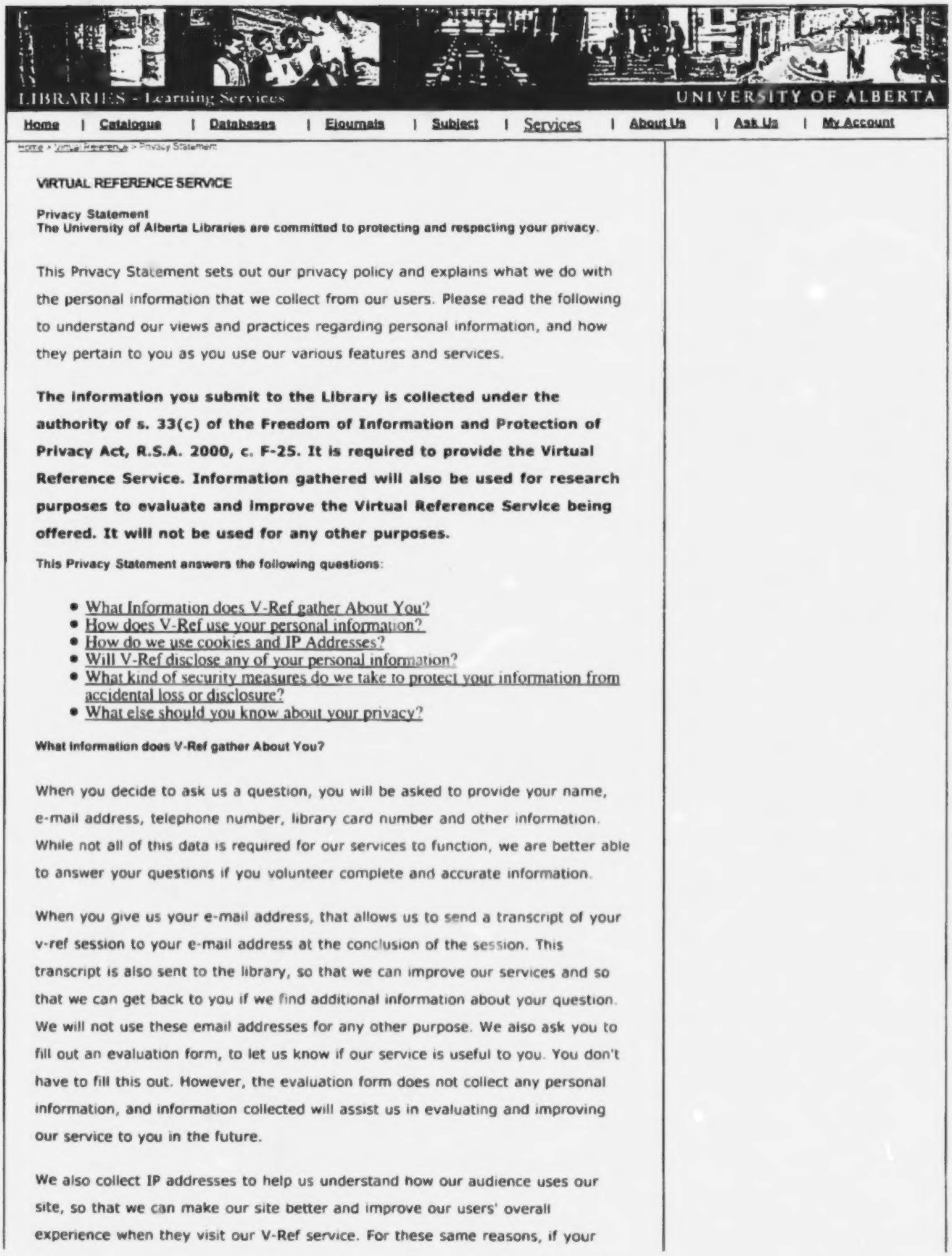
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Home | Catalogue | Databases | Ejournals | Subject | Services | About Us | Ask Us | My Account
Home > Virtual Reference > Privacy Statement

VIRTUAL REFERENCE SERVICE

Privacy Statement
The University of Alberta Libraries are committed to protecting and respecting your privacy.

This Privacy Statement sets out our privacy policy and explains what we do with the personal information that we collect from our users. Please read the following to understand our views and practices regarding personal information, and how they pertain to you as you use our various features and services.

The information you submit to the Library is collected under the authority of s. 33(c) of the Freedom of Information and Protection of Privacy Act, R.S.A. 2000, c. F-25. It is required to provide the Virtual Reference Service. Information gathered will also be used for research purposes to evaluate and improve the Virtual Reference Service being offered. It will not be used for any other purposes.

This Privacy Statement answers the following questions:

- What Information does V-Ref gather About You?
- How does V-Ref use your personal information?
- How do we use cookies and IP Addresses?
- Will V-Ref disclose any of your personal information?
- What kind of security measures do we take to protect your information from accidental loss or disclosure?
- What else should you know about your privacy?

What Information does V-Ref gather About You?

When you decide to ask us a question, you will be asked to provide your name, e-mail address, telephone number, library card number and other information. While not all of this data is required for our services to function, we are better able to answer your questions if you volunteer complete and accurate information.

When you give us your e-mail address, that allows us to send a transcript of your v-ref session to your e-mail address at the conclusion of the session. This transcript is also sent to the library, so that we can improve our services and so that we can get back to you if we find additional information about your question. We will not use these email addresses for any other purpose. We also ask you to fill out an evaluation form, to let us know if our service is useful to you. You don't have to fill this out. However, the evaluation form does not collect any personal information, and information collected will assist us in evaluating and improving our service to you in the future.

We also collect IP addresses to help us understand how our audience uses our site, so that we can make our site better and improve our users' overall experience when they visit our V-Ref service. For these same reasons, if your

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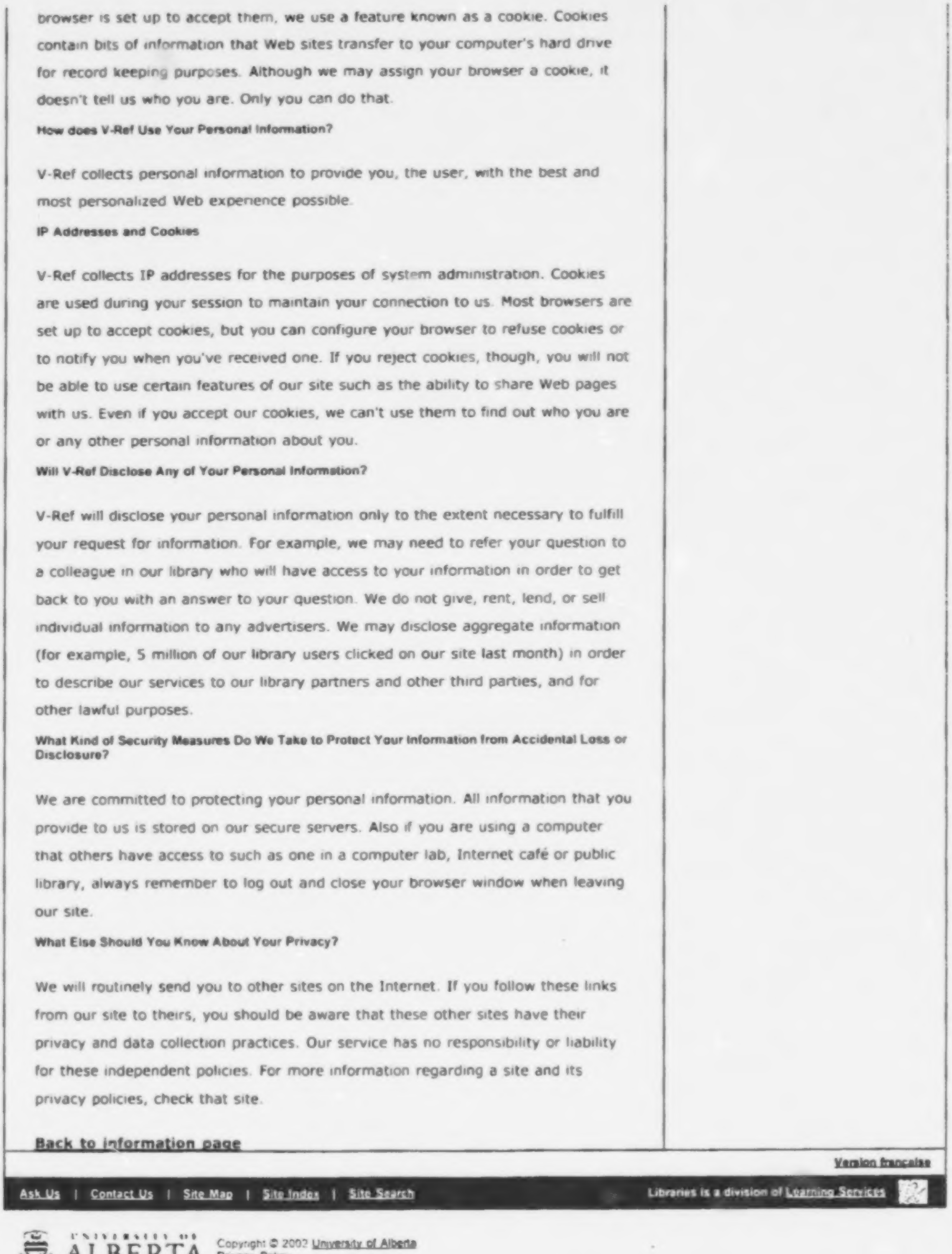
http://www.library.ualberta.ca/ereference/privacy/index.cfm



browser is set up to accept them, we use a feature known as a cookie. Cookies contain bits of information that Web sites transfer to your computer's hard drive for record keeping purposes. Although we may assign your browser a cookie, it doesn't tell us who you are. Only you can do that.

How does V-Ref Use Your Personal Information?

V-Ref collects personal information to provide you, the user, with the best and most personalized Web experience possible.

IP Addresses and Cookies

V-Ref collects IP addresses for the purposes of system administration. Cookies are used during your session to maintain your connection to us. Most browsers are set up to accept cookies, but you can configure your browser to refuse cookies or to notify you when you've received one. If you reject cookies, though, you will not be able to use certain features of our site such as the ability to share Web pages with us. Even if you accept our cookies, we can't use them to find out who you are or any other personal information about you.

Will V-Ref Disclose Any of Your Personal Information?

V-Ref will disclose your personal information only to the extent necessary to fulfill your request for information. For example, we may need to refer your question to a colleague in our library who will have access to your information in order to get back to you with an answer to your question. We do not give, rent, lend, or sell individual information to any advertisers. We may disclose aggregate information (for example, 5 million of our library users clicked on our site last month) in order to describe our services to our library partners and other third parties, and for other lawful purposes.

What Kind of Security Measures Do We Take to Protect Your Information from Accidental Loss or Disclosure?

We are committed to protecting your personal information. All information that you provide to us is stored on our secure servers. Also if you are using a computer that others have access to such as one in a computer lab, Internet café or public library, always remember to log out and close your browser window when leaving our site.

What Else Should You Know About Your Privacy?

We will routinely send you to other sites on the Internet. If you follow these links from our site to theirs, you should be aware that these other sites have their privacy and data collection practices. Our service has no responsibility or liability for these independent policies. For more information regarding a site and its privacy policies, check that site.

Back to information page

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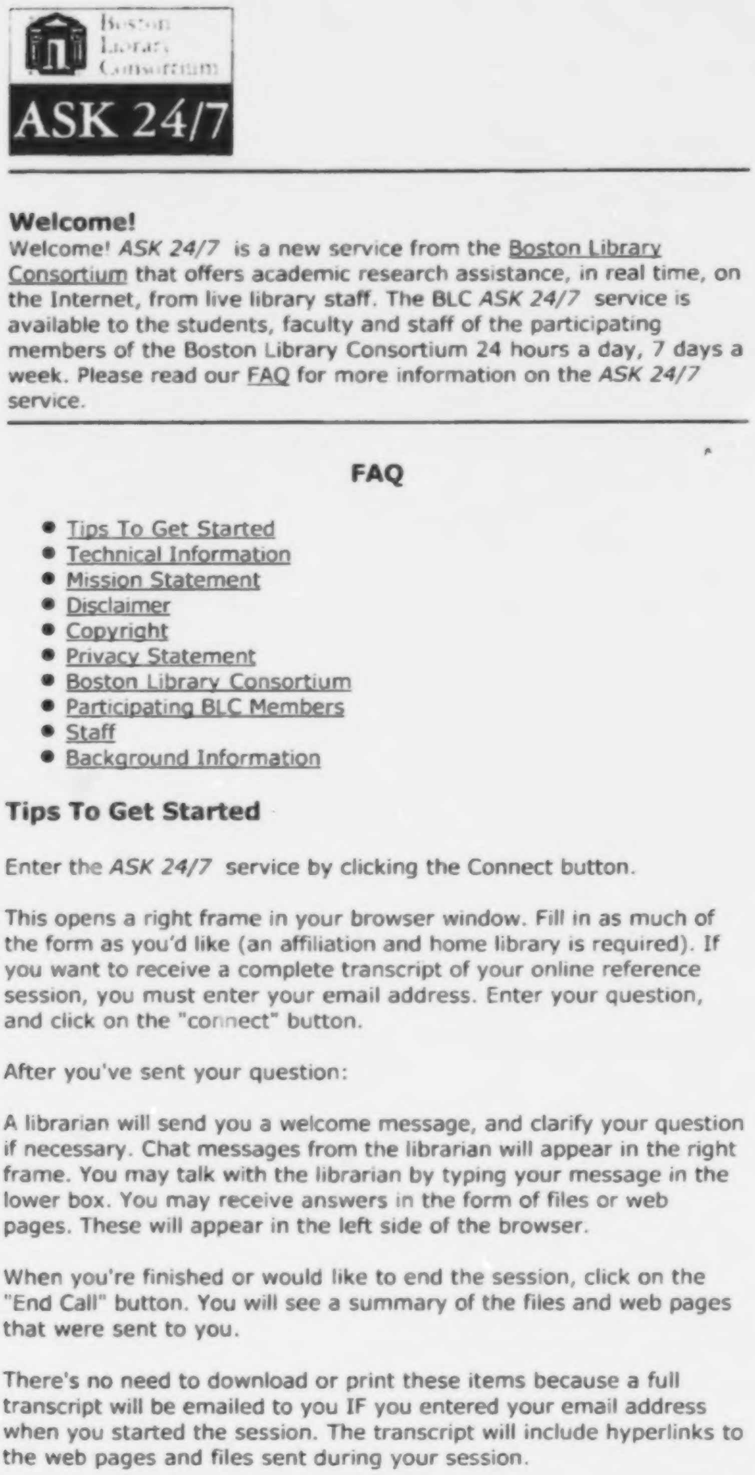

Boston Library Consortium

ASK 24/7

Welcome!

Welcome! *ASK 24/7* is a new service from the Boston Library Consortium that offers academic research assistance, in real time, on the Internet, from live library staff. The BLC *ASK 24/7* service is available to the students, faculty and staff of the participating members of the Boston Library Consortium 24 hours a day, 7 days a week. Please read our FAQ for more information on the *ASK 24/7* service.

FAQ

- Tips To Get Started
- Technical Information
- Mission Statement
- Disclaimer
- Copyright
- Privacy Statement
- Boston Library Consortium
- Participating BLC Members
- Staff
- Background Information

Tips To Get Started

Enter the *ASK 24/7* service by clicking the Connect button.

This opens a right frame in your browser window. Fill in as much of the form as you'd like (an affiliation and home library is required). If you want to receive a complete transcript of your online reference session, you must enter your email address. Enter your question, and click on the "connect" button.

After you've sent your question:

A librarian will send you a welcome message, and clarify your question if necessary. Chat messages from the librarian will appear in the right frame. You may talk with the librarian by typing your message in the lower box. You may receive answers in the form of files or web pages. These will appear in the left side of the browser.

When you're finished or would like to end the session, click on the "End Call" button. You will see a summary of the files and web pages that were sent to you.

There's no need to download or print these items because a full transcript will be emailed to you IF you entered your email address when you started the session. The transcript will include hyperlinks to the web pages and files sent during your session.

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The Copyright Law of the United States (Title 17, United States Code) governs the reproduction, distribution, adaptation, public performance, and public display of copyrighted material. Responsibility for any possible copyright infringement lies solely with the user; the Library disclaims any responsibility or liability resulting thereof.

Privacy Statement

This Privacy Statement defines the BLC *ASK 24/7* Service privacy policy and explains what we do with the information that we collect from our users. Please also read the Privacy FAQ to understand our views and practices regarding personal information, and how they pertain to you as you use our *ASK 24/7* Service.

Information collected about any individual using this service is generally incidental to the technical operation of the system. Such information will not be voluntarily published or shared with any other entity.

Below we describe what information we request and how it is used:

REQUIRED INFORMATION:

Affiliation: Please tell us if you are a student, faculty or staff member connected to a BLC member library. We will use this information for statistical studies of who is using the BLC 24/7 Reference Service.

BLC Home Library: Please tell us your home library. We will use this information to compile statistical reports on where users of the BLC 24/7 Reference Service are based.

OPTIONAL INFORMATION:

Email address: An email address is not required to use this service. If one is provided, it will be used only in the provision of service from this site. No email addresses will be sold or given to any other entities. The BLC Libraries may use the email address to:

- Send a transcript of the session for your reference
- Follow up on an incomplete session

USE OF SESSION TRANSCRIPTS:

Transcripts of every session are stored on our vendor's website.

Transcripts will not voluntarily be shared with any other entities. Transcripts may be used for the following purposes only:

- To email to the user as a record of the session and a reminder of any resources provided during the session
- To monitor and improve the overall quality of service
- To develop aggregated statistical data for reporting on the number of requests received, the number of requests completed, and the average length of sessions.

In the course of clarifying the request for information the Librarian may ask for information regarding purpose (for instance, is this for a class assignment?), or class level (undergraduate, graduate). Such incidental information will be used to identify appropriate resources only. Any information given to the Librarian will be stored in a session transcript.

Boston Library Consortium

Founded in 1970, the Boston Library Consortium is a cooperative association of eighteen academic and research libraries. Its purpose is to share human and information resources so that the collective strengths of the group advance the research and learning of the members' constituents. The Consortium supports resource sharing and enhancement of services to users through programs in cooperative collecting, access to electronic resources, access to physical collections, and enhanced interlibrary loan and document delivery. Read more about the BLC at their website.

Participating BLC Members

BLC member libraries participating in this first phase of the BLC's *ASK 24/7* Service are Boston College, Boston University, Brandeis University, Northeastern University, Tufts University, UMass Amherst, UMass Boston, University of Connecticut, University of New Hampshire and Williams College.

Staff

The BLC *ASK 24/7* Service is staffed by professional reference librarians located in participating BLC member libraries and by reference librarians from around the world. When you click on the "connect to a librarian" button, the librarian who answers your question may or may not be a librarian at your local library. This live academic research service is provided 24 hours/day, 7 days a week by professional librarians located around the world.

Background Information

The Boston Library Consortium *ASK 24/7* Service takes advantage of software and partnerships pioneered by the Metropolitan Cooperative Library System (MCLS) in California. The initial project was supported by Federal LSTA funding, administered by the California State Library. To find out more about the project, please visit the 24/7 Reference Website at http://www.247ref.org. To find out more about MCLS, please visit the MCLS Website at http://www.mcls.org.

Last updated 10/17/02.

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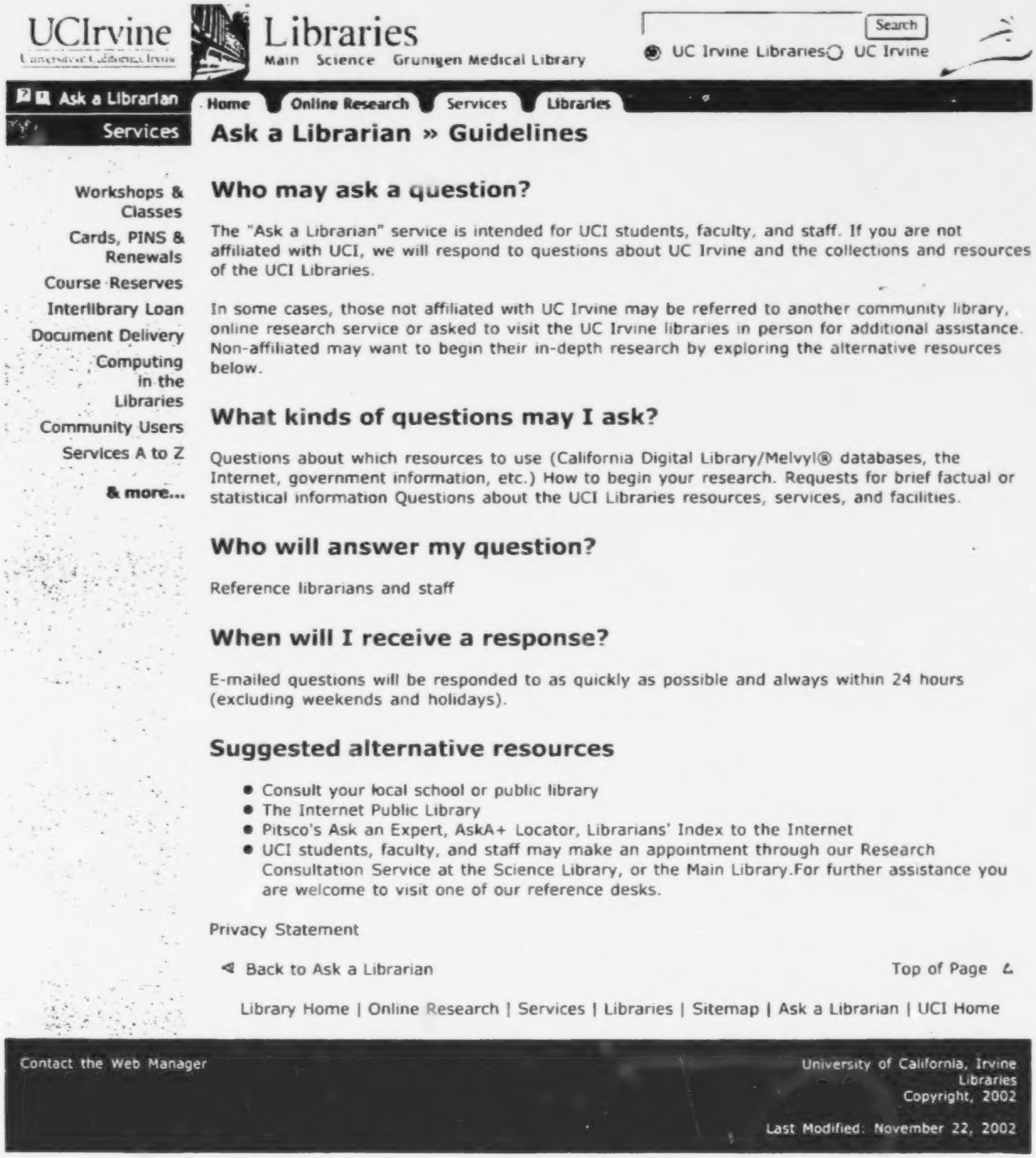
http://www.lib.uci.edu/services/ask/guidelines.html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Cards, PINS & Renewals
Course Reserves
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Document Delivery
Computing in the Libraries
Community Users
Services A to Z
& more...

Ask a Librarian » Guidelines

Who may ask a question?

The "Ask a Librarian" service is intended for UCI students, faculty, and staff. If you are not affiliated with UCI, we will respond to questions about UC Irvine and the collections and resources of the UCI Libraries.

In some cases, those not affiliated with UC Irvine may be referred to another community library, online research service or asked to visit the UC Irvine libraries in person for additional assistance. Non-affiliated may want to begin their in-depth research by exploring the alternative resources below.

What kinds of questions may I ask?

Questions about which resources to use (California Digital Library/Melvyl® databases, the Internet, government information, etc.) How to begin your research. Requests for brief factual or statistical information Questions about the UCI Libraries resources, services, and facilities.

Who will answer my question?

Reference librarians and staff

When will I receive a response?

E-mailed questions will be responded to as quickly as possible and always within 24 hours (excluding weekends and holidays).

Suggested alternative resources

- Consult your local school or public library
- The Internet Public Library
- Pitsco's Ask an Expert, AskA+ Locator, Librarians' Index to the Internet
- UCI students, faculty, and staff may make an appointment through our Research Consultation Service at the Science Library, or the Main Library.For further assistance you are welcome to visit one of our reference desks.

Privacy Statement

◄ Back to Ask a Librarian

Top of Page

Library Home | Online Research | Services | Libraries | Sitemap | Ask a Librarian | UCI Home

Contact the Web Manager

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Libraries
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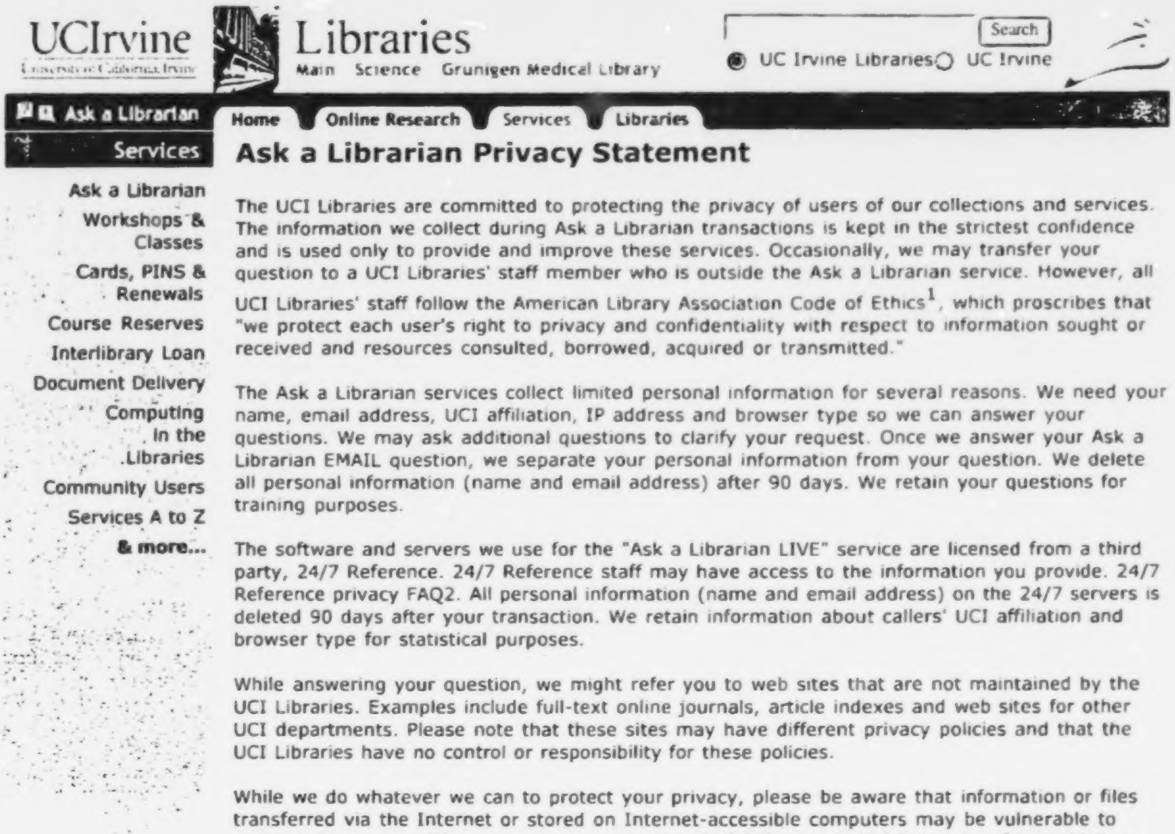
http://www.lib.uci.edu/services/ask/askprivacy.html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Ask a Librarian
Home
Online Research
Services
Libraries
Services
Ask a Librarian
Workshops & Classes
Cards, PINS & Renewals
Course Reserves
Interlibrary Loan
Document Delivery
Computing in the Libraries
Community Users
Services A to Z
& more...

Ask a Librarian Privacy Statement

The UCI Libraries are committed to protecting the privacy of users of our collections and services. The information we collect during Ask a Librarian transactions is kept in the strictest confidence and is used only to provide and improve these services. Occasionally, we may transfer your question to a UCI Libraries' staff member who is outside the Ask a Librarian service. However, all UCI Libraries' staff follow the American Library Association Code of Ethics[1], which proscribes that "we protect each user's right to privacy and confidentiality with respect to information sought or received and resources consulted, borrowed, acquired or transmitted."

The Ask a Librarian services collect limited personal information for several reasons. We need your name, email address, UCI affiliation, IP address and browser type so we can answer your questions. We may ask additional questions to clarify your request. Once we answer your Ask a Librarian EMAIL question, we separate your personal information from your question. We delete all personal information (name and email address) after 90 days. We retain your questions for training purposes.

The software and servers we use for the "Ask a Librarian LIVE" service are licensed from a third party, 24/7 Reference. 24/7 Reference staff may have access to the information you provide. 24/7 Reference privacy FAQ2. All personal information (name and email address) on the 24/7 servers is deleted 90 days after your transaction. We retain information about callers' UCI affiliation and browser type for statistical purposes.

While answering your question, we might refer you to web sites that are not maintained by the UCI Libraries. Examples include full-text online journals, article indexes and web sites for other UCI departments. Please note that these sites may have different privacy policies and that the UCI Libraries have no control or responsibility for these policies.

While we do whatever we can to protect your privacy, please be aware that information or files transferred via the Internet or stored on Internet-accessible computers may be vulnerable to unscrupulous users. We urge you to use caution and follow accepted Internet safety guidelines. See the National Infrastructure Protection Center[3] for basic tips, or the Privacy Rights Clearinghouse[4] or CERT[5] for more detailed more information.

This statement will be revised as appropriate and updates will be posted to this site.

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[1] Code of Ethics, American Library Association. http://www.ala.org/alaorg/oif/ethics.html

[2] 24/7 Reference privacy FAQ. http://www.247ref.org/privacy.htm

[3] National Infrastructure Protection Center, http://www.nipc.gov/warnings/computertips.htm

[4] Privacy Rights Clearinghouse. http://www.privacyrights.org/fs/fs18-cyb.htm

[5] CERT. http://www.cert.org/tech_tips/home_networks.html

◀ Back to Guidelines

Top of Page ▲

Library Home | Online Research | Services | Libraries | Sitemap | Ask a Librarian | UCI Home

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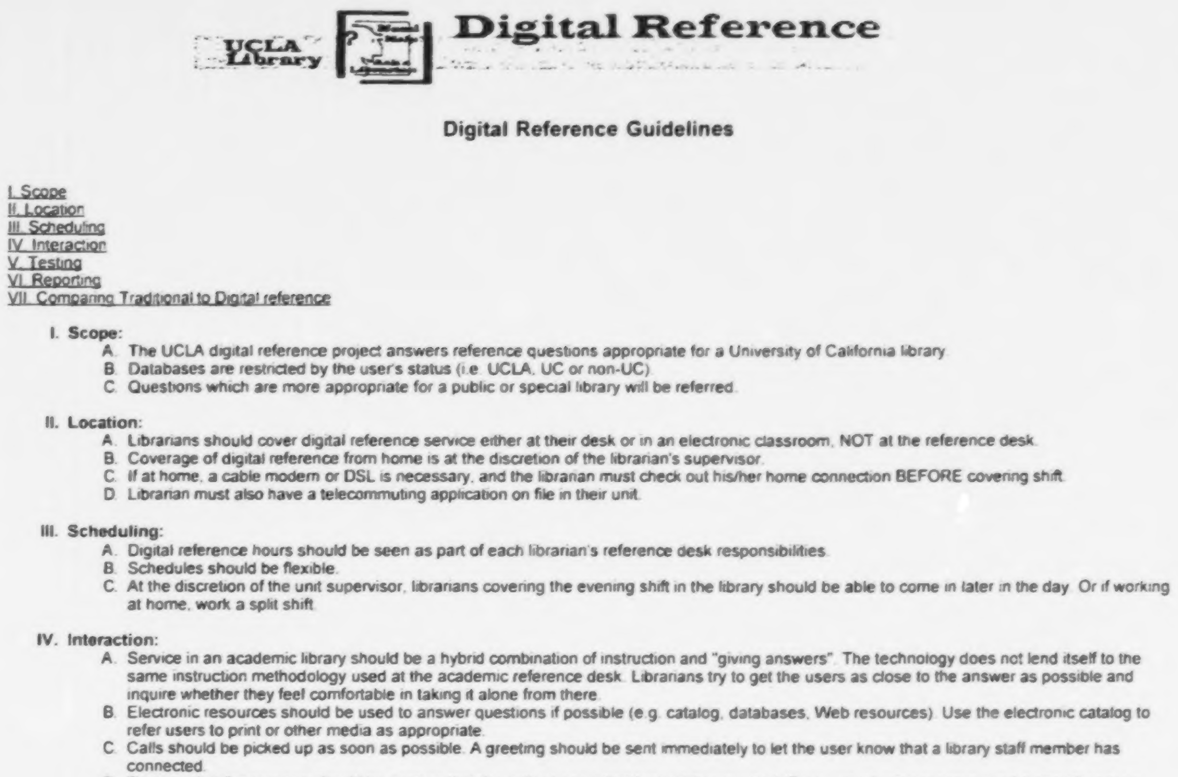
http://www.library.ucla.edu/digref/guidelines.htm



UCLA Library **Digital Reference**

Digital Reference Guidelines

I. Scope
II. Location
III. Scheduling
IV. Interaction
V. Testing
VI. Reporting
VII. Comparing Traditional to Digital reference

I. Scope:

A. The UCLA digital reference project answers reference questions appropriate for a University of California library.
B. Databases are restricted by the user's status (i.e. UCLA, UC or non-UC).
C. Questions which are more appropriate for a public or special library will be referred.

II. Location:

A. Librarians should cover digital reference service either at their desk or in an electronic classroom, NOT at the reference desk.
B. Coverage of digital reference from home is at the discretion of the librarian's supervisor.
C. If at home, a cable modem or DSL is necessary, and the librarian must check out his/her home connection BEFORE covering shift.
D. Librarian must also have a telecommuting application on file in their unit.

III. Scheduling:

A. Digital reference hours should be seen as part of each librarian's reference desk responsibilities.
B. Schedules should be flexible.
C. At the discretion of the unit supervisor, librarians covering the evening shift in the library should be able to come in later in the day. Or if working at home, work a split shift.

IV. Interaction:

A. Service in an academic library should be a hybrid combination of instruction and "giving answers". The technology does not lend itself to the same instruction methodology used at the academic reference desk. Librarians try to get the users as close to the answer as possible and inquire whether they feel comfortable in taking it alone from there.
B. Electronic resources should be used to answer questions if possible (e.g. catalog, databases, Web resources). Use the electronic catalog to refer users to print or other media as appropriate.
C. Calls should be picked up as soon as possible. A greeting should be sent immediately to let the user know that a library staff member has connected.
D. Frequent brief messages should be sent so that the caller knows that he is still connected. Frequent, short messages work better than long paragraphs. Break long sentences into parts and send with ellipses indicating a continuing thought.
E. Access databases as appropriate to the user's status. Be aware that certain databases are restricted to the UCLA or UC community only.
    1. Check the user's log in information for a UCLA ID # or UCLA email address. If neither is evident, ask the user if he is UCLA affiliated.
    2. Do not Escort non-affiliated users through proprietary resources; instead recommend resources available at the user's campus or local library (e.g. Los Angeles Public Library).
F. Although the software allows librarians to handle multiple callers simultaneously, it can be confusing and overwhelming to do so. It is therefore recommended that the librarian help no more than two callers at one time.
    1. When you are in a transaction and another patron calls, you will not be able to continue to chat with the first until acknowledging the second.
    2. Immediately retrieve your second caller and either explain that you are helping another patron, (e.g. "I'm currently helping someone, would you like to wait, click-in later, or send an email message?") or return to your first patron, finish your thought(s) and explain the situation ("I have another caller waiting, do you think you have enough information to continue on your own?").
G. Librarians should not hesitate to refer users to subject specialists if they cannot fully help the user. Direct the user to the appropriate library or subject specialist, or offer to forward the question to the appropriate person.
H. Make sure that the caller's question is answered completely, worked on off-line, or referred to a subject specialist. Follow up with the caller by email or phone if necessary.
I. Cordially wrap-up your transaction before disconnecting; e.g. tell your patron, "thanks for using our service," "please call again," etc.
J. If a caller gets unexpectedly disconnected, the librarian should get the caller's email address from the transcript and inquire whether an answer was found or if the caller needs more assistance.

V. Testing:

A. Librarians should be periodically checking the software (i.e. chat, page push, Escort) during their shift. The project is still a testing vehicle, and librarians should be assessing the functionality of the software. As a tester, use your own email address and make sure you receive a transcript.
B. Make sure that the reports/transcript feature is working by going to http://www.247ref.org/info and checking your transcripts. Note: there is sometimes a delay of several hours before a transcript appears.

VI. Reporting:

A. At the end of your shift send an email to the digref-l listserv at digref-l@library.ucla.edu describing what occurred during your shift.
    1. You should include the date and time of session, questions received, what you did (databases used, referral etc), comments on how you feel the transaction went, any problems, whether any follow-up was required (referred question, emailed or phoned caller later).
    2. If you did not have any callers, list the functions and databases you tested.
B. This is the appropriate forum for librarians to ask for comments from their colleagues and for others to suggest alternative strategies for answering specific questions.

VII. Comparing Traditional to Digital reference:

Novice digital reference librarians often display hesitation in attempting the new technology. By remembering some of the basic similarities and differences of digital and traditional reference work, many of these hesitations can be dissipated.

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http://www.library.ucla.edu/digref/guidelines.htm

	Traditional Reference	Digital Reference	Rationale
Reference interview	Assess patron's information needs	Assess patron's information needs	A patron's initial question does not always reflect accurately his information needs
	Assess what patron has already done/found/used	Assess what patron has already done/found/used	Saves time & effort. Prevents repetition, unless you feel patron's previous efforts were inefficient.
Search	Use sources appropriate to user & his needs.	Use sources appropriate to user & his needs.	Subscription databases are restricted to UC or UCLA-affiliated users only.
Connect with patron	Employ open, friendly body language.	Use patron's first name.	Even computer based conversations can be warm & friendly.
		Keep connection going with frequent brief messages.	Don't let the patron wonder if you've been disconnected.
		Tell the patron what you are doing at each step. If using escort, let patron do the search while you coach.	There may be lag time. Keep the transaction interactive.
Communication styles		Use chat for quick informational queries.	Chat is speediest & most efficient for certain queries.
		Push web pages for limited information needs (library hours, policies, phone numbers, etc.).	Often patron only needs starting point and can continue from there by himself.
		Employ Escort for more in depth research coaching. Let patron continue on his own when he is ready.	When patron needs research coaching, Escort facilitates simultaneous browsing and maximum interactivity.
		Open separate browser to check or search site before recommending it to patron if applicable.	Sometimes you may be uncertain of the best site or strategy. This lets you check your options privately first.
Know limitations	Refer to subject library or specialist if librarian has limited expertise for query.	Refer to subject library or specialist if librarian has limited expertise for query.	You cannot expect to know everything about everything!
	Spend time wisely; do not allow a query to run too long.	Try to keep your transaction under 15 minutes.	You may be misusing your time. Offer to follow up with an email or other contact.
	Recommend an appointment with a librarian if query is complex.	Recommend an appointment with a librarian if query is complex.	Some queries are best answered in face-to-face appointment formats.
Follow up	Make sure patron has the information necessary to continue to next step on his own.	Make sure patron has the information necessary to continue to next step on his own; use follow-up email if appropriate.	This is the proper closure of a reference transaction.
Technical glitches	Inform appropriate body.	Call Carol Bonnefil or Cherry Hill Company either while still online with patron or afterwards as appropriate.	Sometimes a glitch can be fixed while still online with patron. All glitches should be reported for servicing.
	Improvise as best as possible (e.g. give patron LC guide pamphlet if catalog down).	Use functions that ARE working; e.g. if Escort not working, push pages and talk patron through process.	By thinking creatively on our feet, we can usually satisfy the patron's basic needs even in adverse circumstances.

rev. 6/19/02 DM

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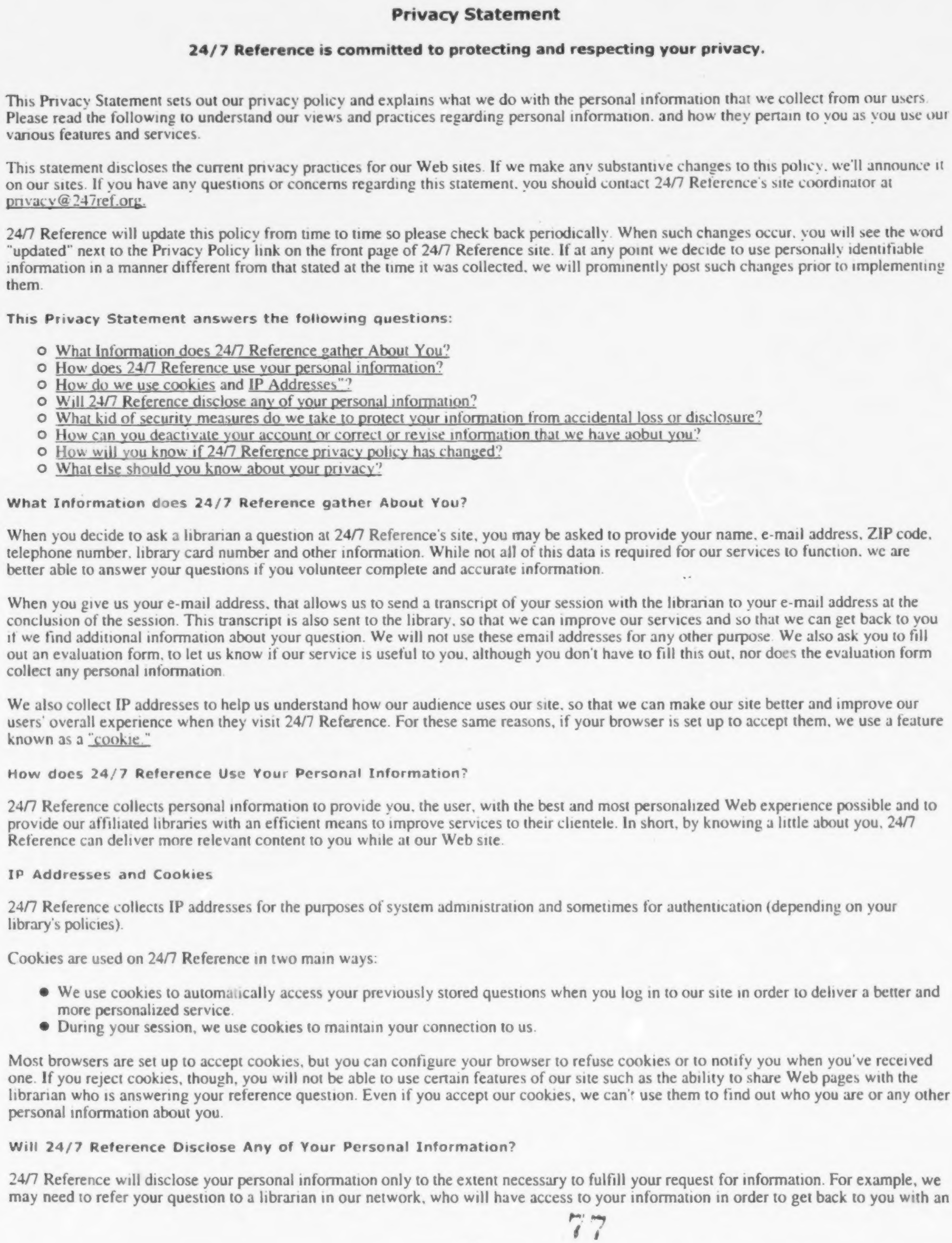
Last updated: June 20, 2002

UNIVERSITY OF CALIFORNIA, LOS ANGELES

http://www.247ref.org/staging_portal/247priv.htm



Privacy Statement

24/7 Reference is committed to protecting and respecting your privacy.

This Privacy Statement sets out our privacy policy and explains what we do with the personal information that we collect from our users. Please read the following to understand our views and practices regarding personal information. and how they pertain to you as you use our various features and services.

This statement discloses the current privacy practices for our Web sites. If we make any substantive changes to this policy. we'll announce it on our sites. If you have any questions or concerns regarding this statement. you should contact 24/7 Reference's site coordinator at privacy@247ref.org.

24/7 Reference will update this policy from time to time so please check back periodically. When such changes occur. you will see the word "updated" next to the Privacy Policy link on the front page of 24/7 Reference site. If at any point we decide to use personally identifiable information in a manner different from that stated at the time it was collected. we will prominently post such changes prior to implementing them.

This Privacy Statement answers the following questions:

- What Information does 24/7 Reference gather About You?
- How does 24/7 Reference use your personal information?
- How do we use cookies and IP Addresses"?
- Will 24/7 Reference disclose any of your personal information?
- What kid of security measures do we take to protect your information from accidental loss or disclosure?
- How can you deactivate your account or correct or revise information that we have aobut you?
- How will you know if 24/7 Reference privacy policy has changed?
- What else should you know about your privacy?

What Information does 24/7 Reference gather About You?

When you decide to ask a librarian a question at 24/7 Reference's site, you may be asked to provide your name. e-mail address. ZIP code. telephone number. library card number and other information. While not all of this data is required for our services to function. we are better able to answer your questions if you volunteer complete and accurate information.

When you give us your e-mail address. that allows us to send a transcript of your session with the librarian to your e-mail address at the conclusion of the session. This transcript is also sent to the library. so that we can improve our services and so that we can get back to you if we find additional information about your question. We will not use these email addresses for any other purpose. We also ask you to fill out an evaluation form. to let us know if our service is useful to you. although you don't have to fill this out. nor does the evaluation form collect any personal information.

We also collect IP addresses to help us understand how our audience uses our site. so that we can make our site better and improve our users' overall experience when they visit 24/7 Reference. For these same reasons, if your browser is set up to accept them. we use a feature known as a "cookie."

How does 24/7 Reference Use Your Personal Information?

24/7 Reference collects personal information to provide you. the user. with the best and most personalized Web experience possible and to provide our affiliated libraries with an efficient means to improve services to their clientele. In short. by knowing a little about you. 24/7 Reference can deliver more relevant content to you while at our Web site.

IP Addresses and Cookies

24/7 Reference collects IP addresses for the purposes of system administration and sometimes for authentication (depending on your library's policies).

Cookies are used on 24/7 Reference in two main ways:

- We use cookies to automatically access your previously stored questions when you log in to our site in order to deliver a better and more personalized service.
- During your session. we use cookies to maintain your connection to us.

Most browsers are set up to accept cookies. but you can configure your browser to refuse cookies or to notify you when you've received one. If you reject cookies, though, you will not be able to use certain features of our site such as the ability to share Web pages with the librarian who is answering your reference question. Even if you accept our cookies, we can't use them to find out who you are or any other personal information about you.

Will 24/7 Reference Disclose Any of Your Personal Information?

24/7 Reference will disclose your personal information only to the extent necessary to fulfill your request for information. For example, we may need to refer your question to a librarian in our network, who will have access to your information in order to get back to you with an answer to your question. We do not give, rent, lend, or sell individual information to any advertisers.

We may disclose aggregate information (for example, 5 million of our library users clicked on our site last month) in order to describe our services to our library partners and other third parties, and for other lawful purposes.

We employ contractors to help with our operations. Some or all of these contractors may access the databases of user information. These contractors are subject to confidentiality agreements that restrict their use and disclosure of all information they obtain through their relationship with 24/7 Reference. Except as described in this Privacy Statement, or to comply with applicable laws or valid legal process, or to protect the rights or property of 24/7 Reference, we will not disclose any personal identifiable information about our users.

What Kind of Security Measures Do We Take to Protect Your Information from Accidental Loss or Disclosure?

24/7 Reference is committed to protecting your personal information. All information that you provide to us is stored on our secure servers. Also if you are using a computer that others have access to such as one in a computer lab, Internet café or public library, always remember to log out and close your browser window when leaving our site.

How Can You Deactivate Your Account or Edit the Information We Have About You?

If you want us to delete any information in our databases which links you to your previously asked questions, you should contact 24/7 Reference's site coordinator at privacy@247ref.org. We do not otherwise keep user profiles.

Changes to this Privacy Statement

24/7 Reference may make changes to this Privacy Statement at any time. This site will be updated with the latest version of the Privacy Statement.

What Else Should You Know About Your Privacy?

While we do our best to protect your personal information, 24/7 Reference cannot ensure or warrant the security of any information you transmit to us, and you do so at your own risk.

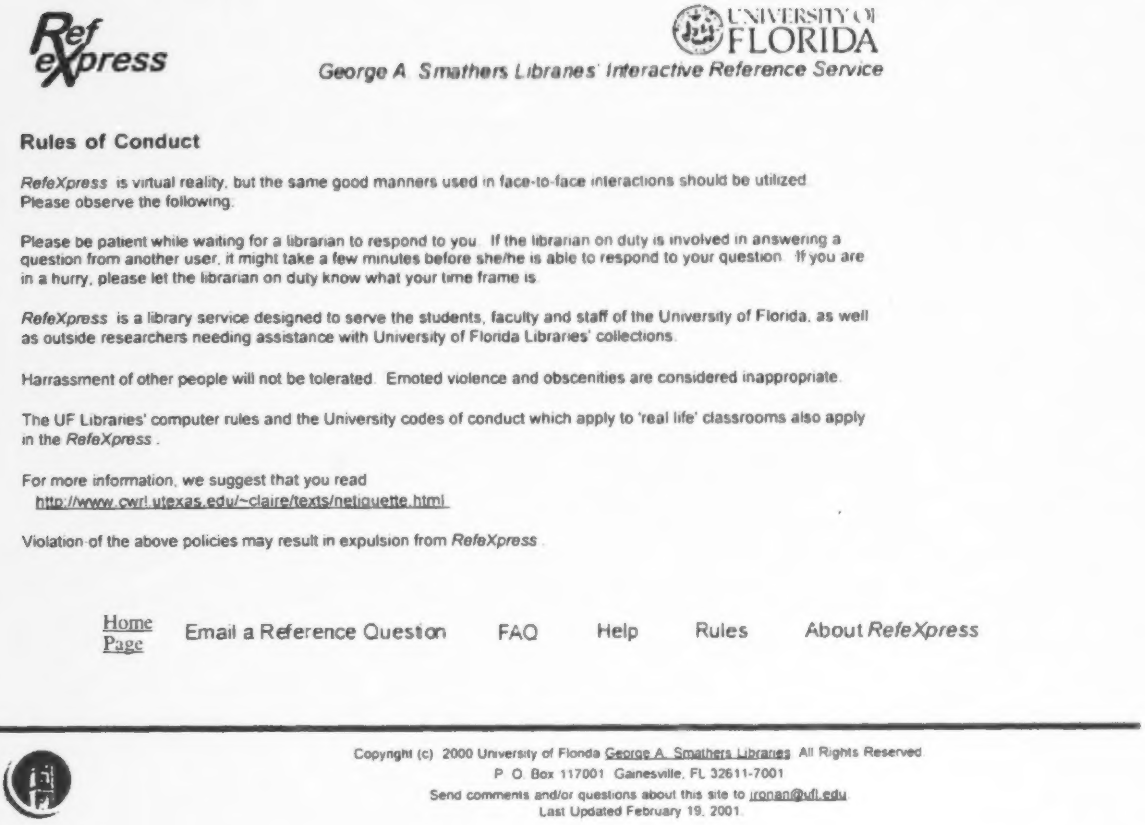
What does all this mean? Just as in the investing world, you must protect yourself. Please be careful and responsible whenever you're online.

Our librarians will routinely send you to other sites on the Internet. If you follow these links from our site to theirs, you should be aware that these other sites have their privacy and data collection practices. 24/7 Reference has no responsibility or liability for these independent policies. For more information regarding a site and its privacy policies, check that site.

Back to information page

UNIVERSITY OF FLORIDA

http://refexpress.uflib.ufl.edu/rxrules.html



RefeXpress

UNIVERSITY OF FLORIDA

George A. Smathers Libraries' Interactive Reference Service

Rules of Conduct

RefeXpress is virtual reality, but the same good manners used in face-to-face interactions should be utilized. Please observe the following.

Please be patient while waiting for a librarian to respond to you. If the librarian on duty is involved in answering a question from another user, it might take a few minutes before she/he is able to respond to your question. If you are in a hurry, please let the librarian on duty know what your time frame is.

RefeXpress is a library service designed to serve the students, faculty and staff of the University of Florida, as well as outside researchers needing assistance with University of Florida Libraries' collections.

Harrassment of other people will not be tolerated. Emoted violence and obscenities are considered inappropriate.

The UF Libraries' computer rules and the University codes of conduct which apply to 'real life' classrooms also apply in the *RefeXpress* .

For more information, we suggest that you read
http://www.cwrl.utexas.edu/~claire/texts/netiquette.html

Violation of the above policies may result in expulsion from *RefeXpress* .

Home Page | Email a Reference Question | FAQ | Help | Rules | About *RefeXpress*

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P. O. Box 117001 Gainesville, FL 32611-7001
Send comments and/or questions about this site to jronan@ufl.edu
Last Updated February 19, 2001.

UNIVERSITY OF ILLINOIS AT URBANA-CHAMPAIGN

http://www.library.uiuc.edu/ugl/vr/privacy.html

ILLINOIS

LIBRARY GATEWAY

Ask a Librarian Privacy Policy

Back to Ask a Librarian Page

Introduction

The Reference and Undergraduate Libraries respect the privacy of our patrons. This policy is intended to let users know what information is collected by the chat service and how it is used. The software we use (HumanClick) also has a privacy policy, posted at : http://www.humanclick.com/support/privacy.htm.

The Library Privacy Policy consists of the following :

- what information is collected by our chat service
- what the information is used for
- who has access to the information
- with whom the information may be shared
- what choices are available to you regarding collection, use and distribution of the information

1: What information is collected by our chat service?

All chats are logged by the software we are using, HumanClick. In addition, the library keeps a staff-use-only database of all of the logs collected by HumanClick.

2: What is the information used for?

The information is used to help analyze the amount and types of questions we are being asked. This helps determine appropriate staffing levels, and aides in training librarians and graduate students for the service.

3: Who has access to this information?

The information collected by the library is only accessible to librarians and staff associated with the Ask a Librarian project.

4: Who does the library share the information with?

Individual chats are not shared with anyone outside of UIUC library and staff. Statistics generated from chat logs, as well as excerpts, may be used for reports or publications. However, information about specific individuals (e.g. IP address, E-Mail, names, phone numbers, etc.) that might be included as part of a chat transcript will never be shared outside of the UIUC library system.

5: What choices do users have about the collection, use, and distribution of their information?

Any patron that want to have a record of the their chat deleted may email dh-ward@uiuc.edu to request the deletion of their chat transcript from the UIUC Library database. Users will need to know the date and exact time their chat started, as well as their IP address in order to be sure the exact chat can be found.

HumanClick also keeps copies of chat transcripts. For information on HumanClick's policies, see http://www.humanclick.com/support/privacy.htm.

University of Illinois at Urbana-Champaign
Library Gateway Homepage
Comments to: VR Staff
Updated on: 03.27.01 DHW

RPPM 26

Middleton Virtual Reference Services
(Approved 11/2001)

Policy

The primary goals of Middleton Virtual Reference Services are to support the curriculum and research needs of the faculty, students and staff of Louisiana State University and to educate remote users to retrieve and utilize information in an increasingly digital environment. The following services are available through the Middleton Virtual Reference Services:

1. **Ask A Librarian**- This service allows researchers to electronically ask questions they might ask at the reference desk. Replies are sent to users via e-mail within 24 hours, excluding weekends and holidays.
2. **Middleton FAQ**- This service provides quick answers to frequently asked questions.
3. **Real Time Reference**- This service is designed for users to ask questions and get answers in a real time online environment from library staff using chat room technology.

Procedures

Ask A Librarian

1. This electronic reference service is designed to provide brief answers to factual questions and/or suggestions for locations and sources which might help to answer questions.
2. Questions may be submitted 24 hours a day, 7 days a week via the library's website using the following URL address: http://www.lib.lsu.edu/lib/dear.html. Questions should be stated as clearly as possible to facilitate a prompt response.
3. Replies are normally sent via e-mail within 24 hours, excluding weekends and holidays.
4. When necessary, questions will be referred to the appropriate subject specialist.
5. Priority for this service is given to faculty, students and staff of Louisiana State University. Others will be assisted if their request concerns Louisiana State University or unique resources of Louisiana State University.
6. This service does not allow users to request services normally provided by Interlibrary Loan (i.e. requesting books or articles) or Circulation (i.e. renewals, recalls, or holds). Users requesting such services will be referred to the appropriate department.
7. This service does not provide any legal, medical or financial advice.
8. Patrons with extensive research needs should visit the library for further assistance.
9. Citations to the source of information should be given whenever possible.
10. If the volume of this service becomes too heavy, the service will be limited **only** to faculty, students and staff of Louisiana State University.

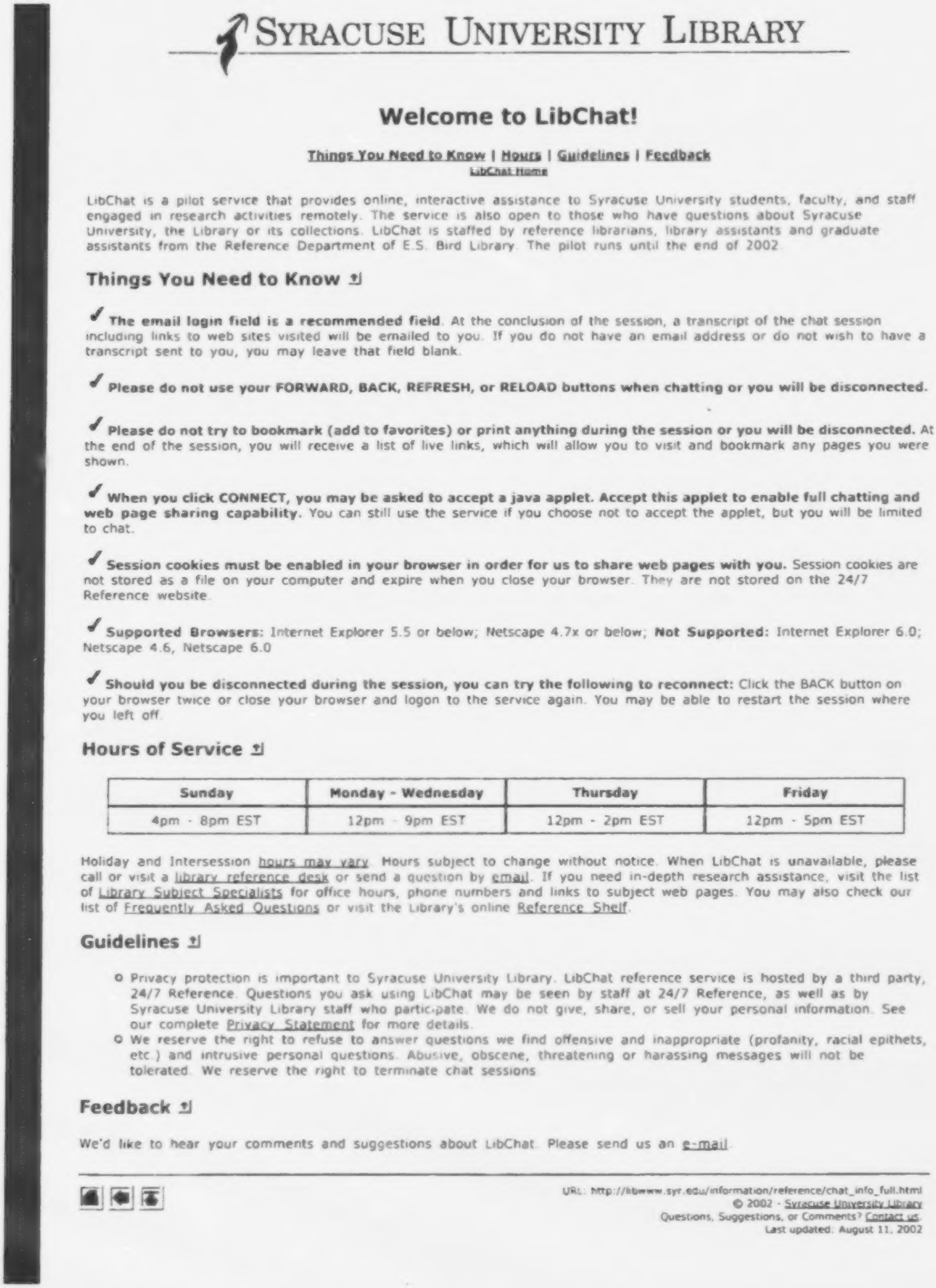
RPPM 26

Middleton FAQ

1. The Middleton FAQ page will contain brief answers to commonly asked questions both at the reference desk and through the Ask A Librarian service.
2. Answers will be reflective of the most appropriate source(s) either in print or electronic format and this page will also refer patrons to online tutorials and internet subject guides.
3. Citations to the source of information should be given whenever possible.

Real Time Reference

1. This service is a way for users to ask questions about library research and resources in real-time.
2. Reference staff will be scheduled to monitor this service Monday - Thursday, 10:00 a.m. - 12 Noon and 1:00 p.m. - 4:00 p.m; Friday 1:00 p.m. - 4:00 p.m. Hours may vary during intersession and holidays.
3. This service will be open to any user, but will be restricted to only Louisiana State University faculty, students and staff if the volume becomes too heavy.
4. This service will answer all types of reference questions in the queue they are received.
5. There is no set amount of time to spend with a user on a question. However, reference staff should remember questions that require extensive research, consultation and/or instruction are best answered through one-on-one consultation.
6. This service does not provide any legal, medical or financial advice.
7. In-depth reference questions may require reference staff to email a response to user.
8. When responding to questions, reference staff should use their first names and institutions, e.g. "Hello. I am Lori from Louisiana State University. How may I help you?"
9. Reference staff will not tolerate inappropriate behavior. As with traditional reference service, such behavior is handled at the discretion of the reference staff member. A warning message may be sent or the session may be terminated.
10. A log of each chat session will be kept and a transcript of the session will be sent to the user and to a library account.
11. The transcripts sent to the library account will not contain any identifying information and will be used for assessment and evaluation purposes.
12. Statistics will be kept of all reference transactions.
13. A survey will be available at the end of each chat session for users to complete on the service and give any other comments regarding the real time reference service.



SYRACUSE UNIVERSITY LIBRARY

Welcome to LibChat!

Things You Need to Know | Hours | Guidelines | Feedback
LibChat Home

LibChat is a pilot service that provides online, interactive assistance to Syracuse University students, faculty, and staff engaged in research activities remotely. The service is also open to those who have questions about Syracuse University, the Library or its collections. LibChat is staffed by reference librarians, library assistants and graduate assistants from the Reference Department of E.S. Bird Library. The pilot runs until the end of 2002.

Things You Need to Know

✓ **The email login field is a recommended field.** At the conclusion of the session, a transcript of the chat session including links to web sites visited will be emailed to you. If you do not have an email address or do not wish to have a transcript sent to you, you may leave that field blank.

✓ **Please do not use your FORWARD, BACK, REFRESH, or RELOAD buttons when chatting or you will be disconnected.**

✓ **Please do not try to bookmark (add to favorites) or print anything during the session or you will be disconnected.** At the end of the session, you will receive a list of live links, which will allow you to visit and bookmark any pages you were shown.

✓ **When you click CONNECT, you may be asked to accept a java applet. Accept this applet to enable full chatting and web page sharing capability.** You can still use the service if you choose not to accept the applet, but you will be limited to chat.

✓ **Session cookies must be enabled in your browser in order for us to share web pages with you.** Session cookies are not stored as a file on your computer and expire when you close your browser. They are not stored on the 24/7 Reference website.

✓ **Supported Browsers:** Internet Explorer 5.5 or below; Netscape 4.7x or below; **Not Supported:** Internet Explorer 6.0; Netscape 4.6, Netscape 6.0

✓ **Should you be disconnected during the session, you can try the following to reconnect:** Click the BACK button on your browser twice or close your browser and logon to the service again. You may be able to restart the session where you left off.

Hours of Service

Sunday	Monday - Wednesday	Thursday	Friday
4pm - 8pm EST	12pm - 9pm EST	12pm - 2pm EST	12pm - 5pm EST

Holiday and Intersession hours may vary. Hours subject to change without notice. When LibChat is unavailable, please call or visit a library reference desk or send a question by email. If you need in-depth research assistance, visit the list of Library Subject Specialists for office hours, phone numbers and links to subject web pages. You may also check our list of Frequently Asked Questions or visit the Library's online Reference Shelf.

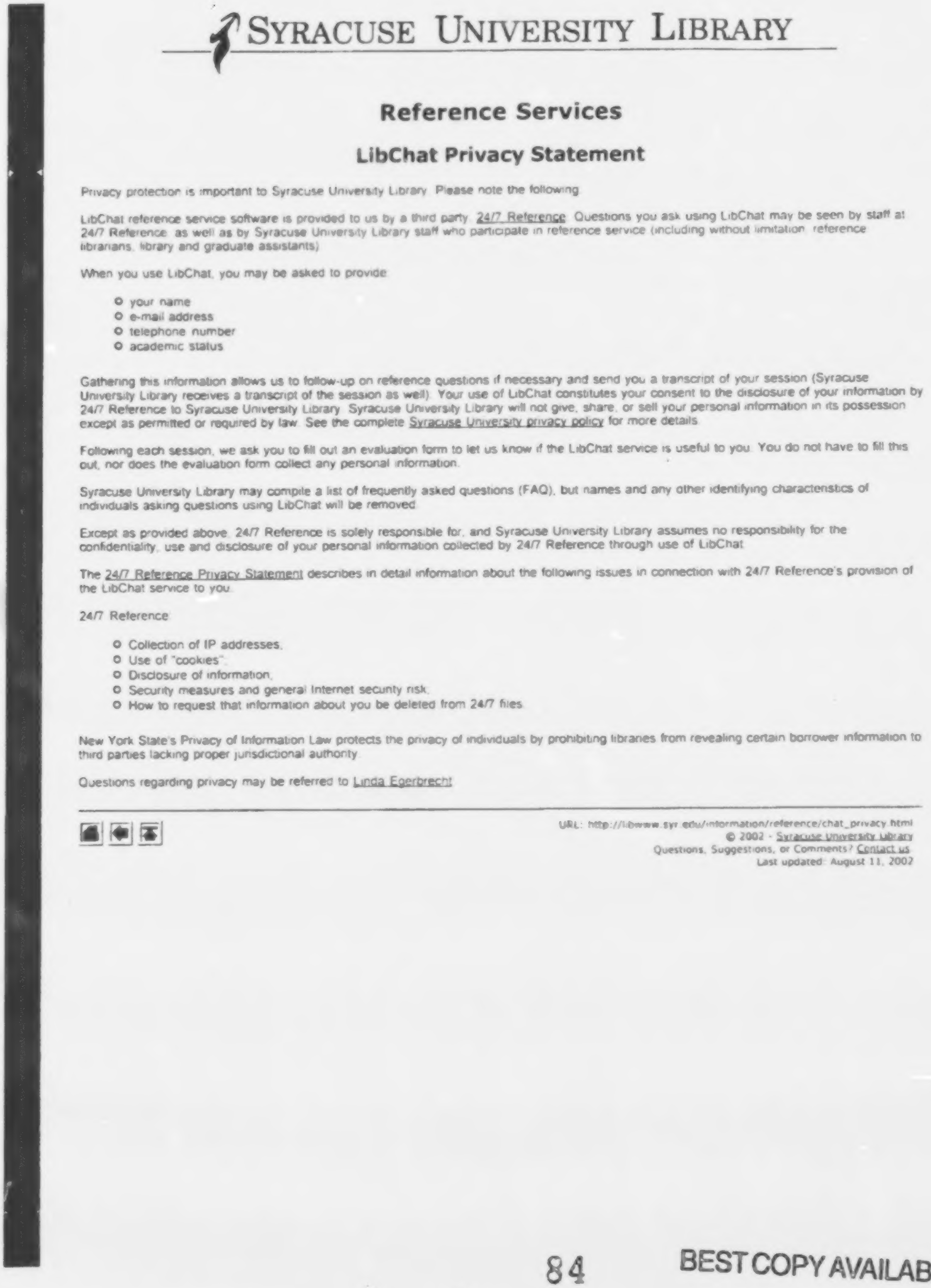
Guidelines

- Privacy protection is important to Syracuse University Library. LibChat reference service is hosted by a third party, 24/7 Reference. Questions you ask using LibChat may be seen by staff at 24/7 Reference, as well as by Syracuse University Library staff who participate. We do not give, share, or sell your personal information. See our complete Privacy Statement for more details.
- We reserve the right to refuse to answer questions we find offensive and inappropriate (profanity, racial epithets, etc.) and intrusive personal questions. Abusive, obscene, threatening or harassing messages will not be tolerated. We reserve the right to terminate chat sessions.

Feedback

We'd like to hear your comments and suggestions about LibChat. Please send us an e-mail.

URL: http://libwww.syr.edu/information/reference/chat_info_full.html
© 2002 - Syracuse University Library
Questions, Suggestions, or Comments? Contact us.
Last updated: August 11, 2002



SYRACUSE UNIVERSITY LIBRARY

Reference Services

LibChat Privacy Statement

Privacy protection is important to Syracuse University Library. Please note the following.

LibChat reference service software is provided to us by a third party, 24/7 Reference. Questions you ask using LibChat may be seen by staff at 24/7 Reference, as well as by Syracuse University Library staff who participate in reference service (including without limitation, reference librarians, library and graduate assistants).

When you use LibChat, you may be asked to provide:

- your name
- e-mail address
- telephone number
- academic status

Gathering this information allows us to follow-up on reference questions if necessary and send you a transcript of your session (Syracuse University Library receives a transcript of the session as well). Your use of LibChat constitutes your consent to the disclosure of your information by 24/7 Reference to Syracuse University Library. Syracuse University Library will not give, share, or sell your personal information in its possession except as permitted or required by law. See the complete Syracuse University privacy policy for more details.

Following each session, we ask you to fill out an evaluation form to let us know if the LibChat service is useful to you. You do not have to fill this out, nor does the evaluation form collect any personal information.

Syracuse University Library may compile a list of frequently asked questions (FAQ), but names and any other identifying characteristics of individuals asking questions using LibChat will be removed.

Except as provided above, 24/7 Reference is solely responsible for, and Syracuse University Library assumes no responsibility for the confidentiality, use and disclosure of your personal information collected by 24/7 Reference through use of LibChat.

The 24/7 Reference Privacy Statement describes in detail information about the following issues in connection with 24/7 Reference's provision of the LibChat service to you.

24/7 Reference:

- Collection of IP addresses,
- Use of "cookies",
- Disclosure of information,
- Security measures and general Internet security risk,
- How to request that information about you be deleted from 24/7 files.

New York State's Privacy of Information Law protects the privacy of individuals by prohibiting libraries from revealing certain borrower information to third parties lacking proper jurisdictional authority.

Questions regarding privacy may be referred to Linda Egerbrecht.

URL: http://libwww.syr.edu/information/reference/chat_privacy.html
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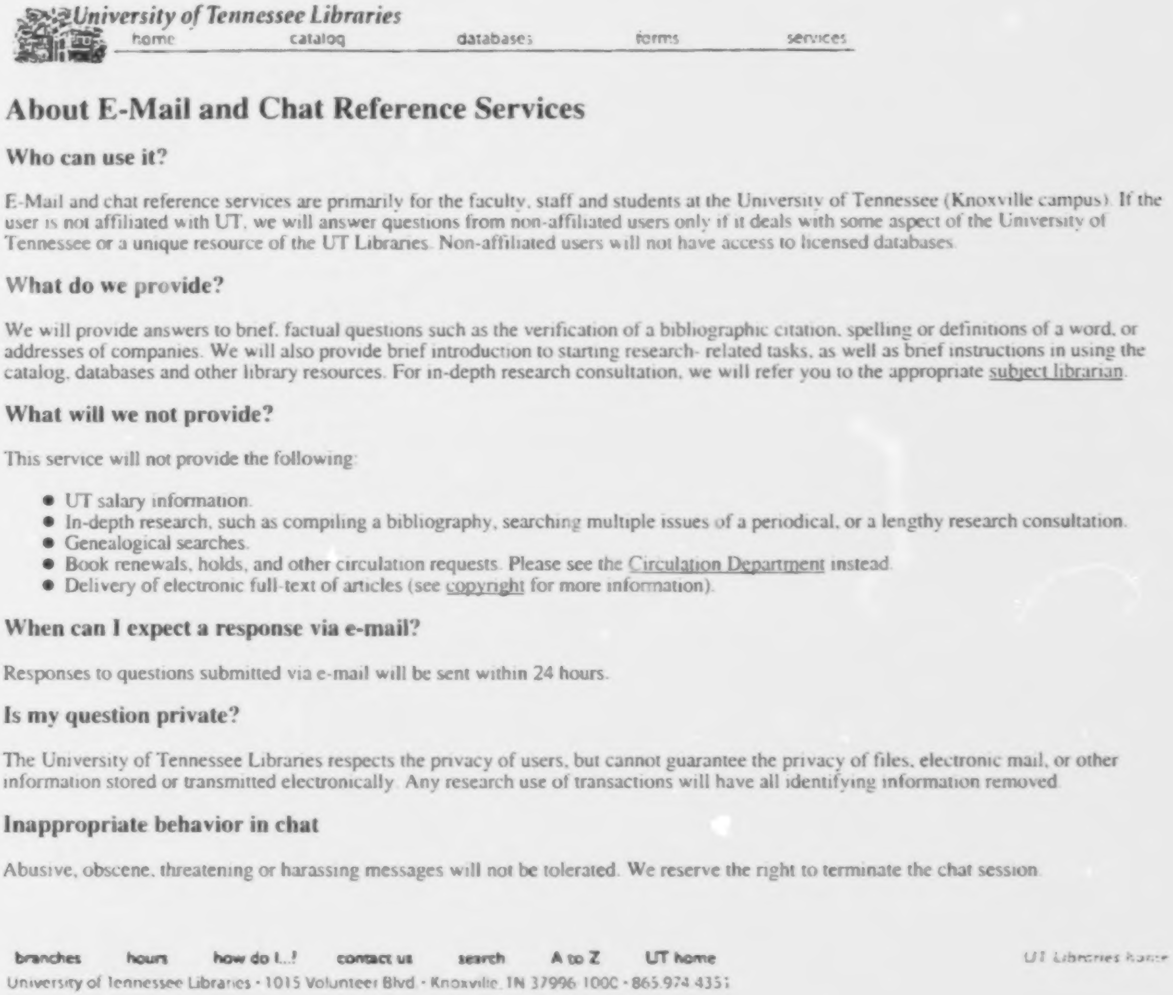
Questions, Suggestions, or Comments? Contact us.
Last updated: August 11, 2002

UNIVERSITY OF TENNESSEE

http://www.lib.utk.edu/refs/askusnow/policy.html



University of Tennessee Libraries

home catalog databases forms services

About E-Mail and Chat Reference Services

Who can use it?

E-Mail and chat reference services are primarily for the faculty, staff and students at the University of Tennessee (Knoxville campus). If the user is not affiliated with UT, we will answer questions from non-affiliated users only if it deals with some aspect of the University of Tennessee or a unique resource of the UT Libraries. Non-affiliated users will not have access to licensed databases.

What do we provide?

We will provide answers to brief, factual questions such as the verification of a bibliographic citation, spelling or definitions of a word, or addresses of companies. We will also provide brief introduction to starting research- related tasks, as well as brief instructions in using the catalog, databases and other library resources. For in-depth research consultation, we will refer you to the appropriate subject librarian.

What will we not provide?

This service will not provide the following:

- UT salary information.
- In-depth research, such as compiling a bibliography, searching multiple issues of a periodical, or a lengthy research consultation.
- Genealogical searches.
- Book renewals, holds, and other circulation requests. Please see the Circulation Department instead.
- Delivery of electronic full-text of articles (see copyright for more information).

When can I expect a response via e-mail?

Responses to questions submitted via e-mail will be sent within 24 hours.

Is my question private?

The University of Tennessee Libraries respects the privacy of users, but cannot guarantee the privacy of files, electronic mail, or other information stored or transmitted electronically. Any research use of transactions will have all identifying information removed.

Inappropriate behavior in chat

Abusive, obscene, threatening or harassing messages will not be tolerated. We reserve the right to terminate the chat session.

branches hours how do I...? contact us search A to Z UT home UT Libraries home

University of Tennessee Libraries • 1015 Volunteer Blvd • Knoxville, TN 37996-1000 • 865.974.4351

WASHINGTON RESEARCH LIBRARY CONSORTIUM

http://www.wrlc.org/virtualref/wrlcguidelines.html

Washington Research Library Consortium

ASK A LIBRARIAN
hours: M-Th 12-6pm & F 1-5pm

WRLC Virtual Reference Polices and Guidelines

These guidelines apply to the pilot project and will be reviewed periodically.

What is the service? This project offers free, live, online reference service combining Internet chat with the ability to send web sites and other information directly to the customer's computer. The primary focus for this service is providing information in electronic format that is available on the Internet through publicly accessible Web sites or proprietary databases available to the virtual patron.

Who can use the service? The primarily clientele of this service are WRLC faculty, staff and students. The IP address and /or Aladin Patron Validation will authenticate a patron as a WRLC faculty, staff or student.

Who provides the service? Reference librarians from participating WRLC libraries trained in using the LSSI software will be on duty during scheduled hours to assist online customers.

When is the service offered? Our initial pilot project will be staffed by a group of 12-15 librarians. We will be open for service Monday-Friday 1-5 p.m.

Service Guidelines

A. Verifying users. The initial target clientele of this service are WRLC faculty, staff and students. A user is verified or authenticated by their IP address or Aladin Patron Validation.

B. Kinds of questions. The primary focus for this service is providing information in electronic format that is available on the Internet through publicly accessible web sites and proprietary databases available to the patron.

C. Average length of transaction. Research on virtual reference sessions indicates an average transaction length of 7-15 minutes. This is not a hard and fast rule, however, customers tend to get impatient if they are kept waiting much longer than that. Librarians may use their own judgment in this area. If there is nobody in the queue waiting and the patron is willing to stay connected, the transaction may go longer.

D. Service tips to ensure customer satisfaction. Providing quality customer service via real-time interaction over the Internet is similar to providing quality customer service via interaction in person or over the telephone. In all three real-time modes, it is important to be professional without being overly formal or impersonal, and to be friendly without being overly informal or chatty. As friendly professionals, we strive to

- Treat each customer individually
- Get straight to the point, but do an effective reference interview to be sure we GET the question.
- Keep sentences brief
- Let the customer know what we plan to do
- Avoid one-word responses, since these feel terse in written exchanges.

Real-time interaction over the Internet, like that over the telephone, requires compensation for lack of visual cues. In both modes, it is important to avoid lengthy silences and let the customer know you are still working on the question. If an answer is not readily forthcoming, we can suggest getting back to the customer later, possibly in a different service mode, such as phone, email, in person, or referring the patron to their home institution for more in-depth service.

Some customer service techniques are unique to real-time interaction over the Internet. To save time typing and ensure consistency in our answers, we can use pre-formatted responses (scripts). We can also suggest activities for the customer to do while waiting for a search to be completed. It might be necessary to seek a particular response from a customer, such as asking the customer to "Let me know when you see the page on your screen."

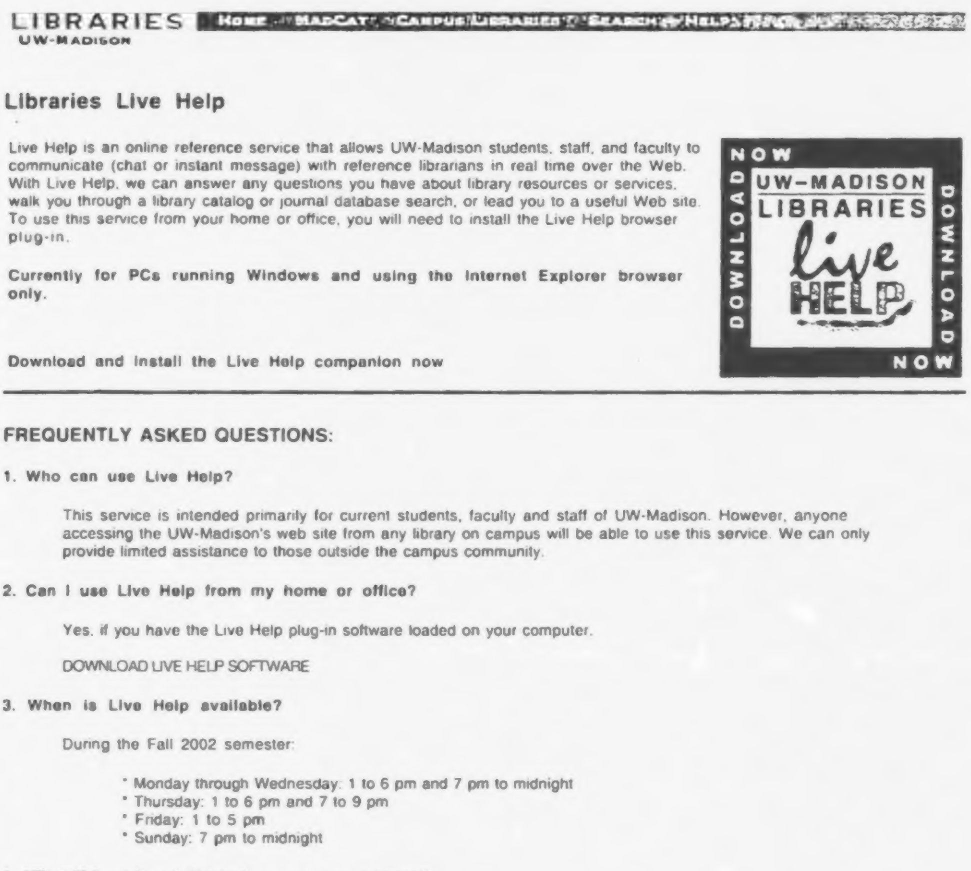
E. System-wide message scripts While there will be common scripts loaded on to each log-in, the use of these messages will not be required. However, it is recommended that we use them as needed to uphold our standard of service in respect to speed, courtesy and consistency. It is especially important to send quick messages to keep the customer informed about searching progress. Scripted responses are very useful for this purpose.

F. Proprietary Databases In answering a question, the librarian may use any database available to the patron through their campus library's affiliation only during the virtual reference session. Librarians will never authenticate a patron. The patron will always authenticate themself to their set of databases.

H. Customer Confidentiality Transcripts from sessions will be used for analysis only. In keeping with library policy, customer information is considered confidential and accessible only by library staff. A patron may choose to check the anonymous box on the virtual reference form, thereby ensuring their name and e-mail will be not appear on the virtual reference transcript.

UNIVERSITY OF WISCONSIN–MADISON

http://www.library.wisc.edu/libraries/reference/livehelp/



LIBRARIES
UW-MADISON

Libraries Live Help

Live Help is an online reference service that allows UW-Madison students, staff, and faculty to communicate (chat or instant message) with reference librarians in real time over the Web. With Live Help, we can answer any questions you have about library resources or services, walk you through a library catalog or journal database search, or lead you to a useful Web site. To use this service from your home or office, you will need to install the Live Help browser plug-in.

Currently for PCs running Windows and using the Internet Explorer browser only.

Download and install the Live Help companion now

FREQUENTLY ASKED QUESTIONS:

1. Who can use Live Help?

This service is intended primarily for current students, faculty and staff of UW-Madison. However, anyone accessing the UW-Madison's web site from any library on campus will be able to use this service. We can only provide limited assistance to those outside the campus community.

2. Can I use Live Help from my home or office?

Yes, if you have the Live Help plug-in software loaded on your computer.

DOWNLOAD LIVE HELP SOFTWARE

3. When is Live Help available?

During the Fall 2002 semester:

- Monday through Wednesday: 1 to 6 pm and 7 pm to midnight
- Thursday: 1 to 6 pm and 7 to 9 pm
- Friday: 1 to 5 pm
- Sunday: 7 pm to midnight

4. What if I can't get through or no one answers?

If all the librarians are busy with other calls, you will see a message asking you to wait until a librarian is free. You may also telephone reference librarians or email your question.

5. What kinds of questions can I ask?

Librarians can answer questions about library services & resources, help you use the library's online catalog and databases, and help you find information on the web. Questions requiring extensive research are better asked in person at a reference desk.

6. Are chats monitored or recorded?

Yes, transcripts of all interactions are saved and used by UW-Madison librarians in order to improve our services to you.

7. Why do you ask for my name and email address?

We will email the transcript to you if you request it during the call. We may also contact you later requesting feedback on the service you received.

8. Does Live Help software use cookies?

No.

Return to: Reference and Research Assistance Home

If you have any questions about
UW-Madison Reference Services
please contact:

Eunice Graupner, Librarian
Chair of Reference Coordinators

Last updated September 12, 2002

UNIVERSITY OF WISCONSIN-MADISON

Training

Welcome to Instant Librarian!

Screen Name____________________
Password________________________

Contact information

Jill Hackenberg
Science and Engineering Library
645-2947 ext. 226
Name: UBLibrarian6
jmh7@acsu.buffalo.edu

Jim Gordon
UB Libraries Systems Office
645-5947
gordonj@acsu.buffalo.edu

Getting Started: Where to go to log on.
The *Instant Librarian Quick Links* web page is located at:
http://ublib.buffalo.edu/libraries/units/sel/aim/readyref.html

This page contains quick links to the AIM schedule, AIM librarians' screen names, ready reference links, class assignments links, and unit e-mail reference links.

Logging on to Instant Messenger

There are 2 possible access points to Instant Messenger.

Start Instant Messenger - This is the full feature version of Instant Messenger. You have more options and preferences to choose from. You can also add faces (smiley, angry…) to your message. The drawback is that Instant Messenger doesn't ding when someone enters the room; it only dings when the person entering the room has sent a message. **Therefore, this version should only be used if you intend to have the chatroom window open at all times so that you can watch it.**

A. Click on "Start Instant Messenger."
B. Enter Screen Name and Password – If you are working from home or your office, you can choose to save your screen name and password, but you should not save them if you are working from a public access PC.
C. Hit the "sign on" button.
D. You should now be logged onto AIM and also inside the ublib chat room.

Start AIM Express - This is the minimalist version of Instant Messenger. You don't have a lot of options to choose from, but it does ding as soon as someone enters the room. It's a good option if you are working on something near the computer. Make sure your speakers and your computer's sound are turned on (please test to become familiar with the sound of someone entering the chatroom.)

A. Click on "Start AIM Express."
B. Enter Screen Name and Password.
C. Click on the "Chat" icon – this will allow you to invite yourself to the ublib chat room.
D. In the box labeled "Screen Names to Invite" type your screen name.
E. In the box labeled "Buddy Chat Room" type ublib.
F. Click on the "send" button.
G. You should now be logged onto AIM and also in the ublib chat room.

Problems with login

If you encounter problems with the login procedure or other technical difficulties, contact Jill Hackenberg or Jim Gordon.

Dealing with difficult questions

The goal of AIM is to answer "quick questions" that patrons have about identifying or searching databases, searching the Internet, and on the general use of the UB Libraries and its resources. The topics may be of a scholarly nature or of general interest. Some questions will be beyond the scope of the service or beyond your ability or expertise to answer. You will also find on occasion that a seemingly simple question will take a long time to answer because there is "too much" information on the Internet.

Personal questions:
If the questions are of a personal nature, explain that it is beyond the scope of our service to answer personal questions. If it is reasonable, point patrons in the direction of information or services that can help to answer their questions. If the question made you feel uncomfortable, please see the section on *Abusive Patrons*.

In-depth research questions or questions beyond the ability of your expertise:
Please refer in-depth questions or questions beyond your expertise to one or more UB subject librarians. The list of subject specialists is linked off of the Instant librarian Quick Links page: http://ublib.buffalo.edu/libraries/units/sel/aim/readyref.html.
Or go directly to http://ublib.buffalo.edu/libraries/staff/.

Time-consuming questions:
Try not to spend more than 30 minutes searching for an answer to a patron's question. If you have time, and the patron is willing to be patient, use your own discretion. Time-consuming questions are often more successful if you have the patron search alternate sources. Try to give them specific sources to search to avoid duplication and explain a strategy for searching that source. If the patron's topic is broad and you have many documents or citations to read through, send them several of the URLs to look at. This may help them narrow the scope of the subject to something more manageable. If you do not have the time to answer the question, refer the patron to a subject librarian, to the reference desk in one of UB Libraries, or to ASKASL@buffalo.edu.

Information on Choosing Search Engines
These two websites will help you to decide which search engine to use and the best search strategies for each search engine.

Search Engine Showdown	http://www.searchengineshowdown.com/
Online Magazine	http://www.onlinemag.net/

Abusive and inappropriate patron behavior

If a patron is inappropriate, abusive, or otherwise disruptive, please record the following information:
Date ______________________________
Time ______________________________
Screen Name _________________________
Behavior or message____________________

This rarely happens, but if it does please report it to Jill Hackenberg.

Answering questions

UB's Resources

You should practice and become an expert searcher in the UB Libraries Catalog and using the various webpages of the UB libraries. Your time spent now learning the webpages and locations of frequently asked items will serve you well.

AIM practice

I recommend that you open up your own personal Instant Messenger account, so you can practice with friends, or be anonymous [non-UB] while chatting in other chatrooms.

Scheduling

Each person has a timeslot that they are responsible for throughout the semester. All are expected to trade hours with another AIM staffer for situations when they are unavailable. Use the AIM listserv (UBLIB-AIM-LIST@listserv.acsu.buffalo.edu) to ask for trades. In case of illness, notify Jill if you are out sick, or have someone call her for you. The weekly schedule and the list of AIM staffers are on the Instant Librarian Quick Links page. http://ublib.buffalo.edu/libraries/units/sel/aim/readyref.html

4/02

Ask a Librarian Live
Basics, hints, and FAQs

version 1.0 (summer 2002)

SCOPE OF SERVICE
ASK is intended to address short-answer inquiries and general ready-reference questions. These include but are not limited to: brief factual questions such as address and phone numbers; general questions about the UCSB Libraries; questions about the online catalog and database searching; help in locating information found on databases and websites. In general, limitations that apply to telephone reference service at the UCSB Libraries also apply to ASK Live. Detailed database searching, compiling bibliographies, document delivery, patron account problems and the like are generally outside the scope of the service.

SCHEDULING AND STAFFING
ASK Live will operate Monday – Friday from 1-4 PM until Fall Quarter, by which time we hope to be able to increase the hours of operation. Eric will lead scheduling. All public service librarians will participate at some point (although in the future librarians less effective with chat reference may choose to serve more desk hours), including all those in InfoServices and Collection Coordinators, SEL, and Arts and Music.

At the outset, all staffing for the chat service will be done from an office or other non-public service point. We may *eventually* experiment with some staffing from public service points to the extent that the staffing librarian and desk supervisor feel comfortable, and if we can use the chat software somewhere close to as efficiently as we use the telephone for reference.

LENGTH OF REFERENCE TRANSACTIONS
ASK Live will handle all reference questions that can reasonably be expected to be answered in 10 minutes. Although times may vary, 10 minutes is a good cutoff point. If the query takes much longer than that, it's likely that the process has become inefficient, and the librarian should consider working with the patron on the phone or in person. A pre-written ("scripted") message is included in the system and may be used by the librarian (see "scripted messages" below) to suggest this course of action.

INTENDED AUDIENCE
Priority of service will be given to current students, faculty, and staff at UCSB. Although patrons can self-designate their status, we currently have no system for verifying that this is true. We're hoping to come up with something where if the patron is using our proxy server, we can see the UCSB IP address, and can send them items freely. In the meantime, use your judgement.

ASK Live is open to users who are not currently affiliated with UCSB, provided the question can be answered quickly or it involves resources unique to the Libraries' collections. Database searches and requests for online articles from non-affiliated users fall outside the scope of the service, and *licensing restrictions prevent sending information from proprietary databases.* A pretty good rule of thumb is to consider how you would handle the same query via the telephone. For instance, it is generally acceptable to cut and paste a citation from a licensed database just as you may read it to a patron over the phone. You would not, however, send full-text to a non-UCSB person. In these cases, users can be notified directly or sent a scripted "out of scope" message, suggesting another approach.

RESPONSE CONTENT AND STYLE
While chat lends itself well to an informal communication style, this is still a reference service and should assume the same standards and courtesies that apply to in-person reference interviews. This also includes citing the sources we use in answering questions.

Communication should be in short sentences and should avoid the use of chat lingo and abbreviations **unless the patron has initiated such lingo**. Otherwise, keep to standard English. Remember that the use of all capital letters in a chat or e-mail exchange is the equivalent of SHOUTING. Don't, however, obsess overly about typos and the like.

CONFIDENTIALITY
ASK online and ASK e-mail do not require that users disclose their names or any other personal information. Email addresses are only required if the patron would like to receive a transcripts of the session.

All personal information and texts of ASK online sessions remain strictly confidential. Occasionally, edited versions of transcripts may be used, by library staff only, for purposes of training or statistical reports, but names of patrons and librarians will be removed beforehand.

The main ASK page links to the UC confidentiality statement, to which we will adhere.

Using LSSI:

Logging in and getting patrons:

You must use Internet Explorer version 5 or later. If you have any trouble getting on, ask Eric.

1. Goto: ucsb.virtualreference.net
2. Type your username and password. Patrick sent out usernames; none have passwords, you can add one once you're in.
3. Choose session inbox
4. Choose the **UCSB Ask a Librarian Live** queue, hit the **plus** key, and click **monitor**.
5. Once you are monitoring the service, you may choose **Settings** to set the bells to ring. Now, if your computer has speakers, listen for a bell when a patron comes online. So you may minimize that window and work on something else, watching for the bell to ring. If you don't have speakers, you can do the same thing, but look for the status bar for the session to begin flashing if someone comes on. You do not have to click "I am available to assist patrons", but if you do, it will automatically "get patron", and initiate the console box, which will be tough to miss if you're worried about missing someone when they enter the service.

Working with Patrons: the Console

First, quickly check a few things:

1. Is the patron UCSB affiliated?

The initial form the patron fills out asks them to specify whether they are Faculty/Staff, Grad, Undergrad, or non-UCSB. However, there is no true method to verify UCSB affiliation. But when you first begin a session, click on the patron's name; the resulting screen contains the IP address of their computer. If it says 128.111.etc.etc., then they are on campus and you know you're safe. If it doesn't say 128.111, they are off-campus (because even if they are using our proxy server, it doesn't say 128.111...).

2. Are they using Basic or Interact mode?

All users will come into the system using Interact unless they are using Macs or an older browser (before IE or Netscape 4) that doesn't work in Interact. If this is the case, they will automatically be "downshifted" to Basic mode—seamlessly to them. But you'll want to know, as this affects how you work with the patron. Next to their name and session, you will see either an **I** or a **B** note, the I looks a bit like a cursor). See below under Basic and Interact for info on how to use each.

Time, status, and recovering when the patron is lost by accident

You can see how long you've been working with the patron at all times. You can also see connection status. **Green** is good, it means they are with you. A **yellow triangle** is not so good- they are having some sort of network or connection problems, which may or may not lead to **Red**, which generally means they are gone, perhaps not by their choosing. The **Red** may be the only indicator you have of trouble. It may appear the connection is working, you can still send things, and you can even see what they type, but if it's **red**, they probably aren't receiving anything you type or send. If you think you've lost them, try going back to **Sessions in Progress** and rejoining the session. Conversely, if they have trouble, give up, and log back in, LSSI can usually pick everything up where it left off.

Using Interact Mode, Notes:

- It works fully with Pegasus. In fact, a user can be using Netscape 4, log on to LSSI, and successfully use Netscape to search Pegasus.
- Known problem databases and resources: As of 6/21, most databases WILL NOT WORK within LSSI. We need to compile a list. The only things that DO work are ABI/Inform and most of our e-journals. If you try a Gale, Wilson, CSA, Ovid, Firstsearch, or CDL-Hosted database, they can't recognize that we are UCSB folks when we are using LSSI. We are working to fix this, but the best scenario won't have it working for at least another week (as of 6/21). So to share something that is in a database, like a results list, you must use open a separate browser, and use Material Sharing (see under Basic, below) or email them the records you find.
- It is generally recommended to turn off the **Escort** button at first. This will allow you some trial and error (like seeing if a database works in LSSI) before you send them to a page. It also prevents them from clicking on anything that would throw off your work. As soon as you turn **Escort** back on, they will be sent to the page you are currently on. So you can find what you want, then turn it on when you're ready to share. Conversely, you may want to open a separate browser window and work there, then copy a url, etc., into your console to share with the patron, or use Material sharing.

- **Right click** will jump a patron to that position on a web page **and flash a red arrow** at the spot (when escort is on). If you are escorting someone, you may want to flash the red arrow a few moments before you click on a link (if you right click, then left click immediately, it won't have time to show the arrow; you may right click, count 1 or 2, then click on the link).

Using Basic Mode, Notes:

- You can still send pages, or escort patrons.
- You cannot share text that you type in a web screen. This means they cannot see the words you type in the search box of a database.
- It DOES NOT currently work with Pegasus. You must open a separate browser to search Pegasus with, and then either use **Material sharing**, or paste and/or type the info for the patron and send as a message back in LSSI. It also DOES NOT work with our licensed materials. The tricky thing is, these items will work on our side, the librarian side. But it won't work for the patron. So you may think everything is great, and think you are showing or escorting to all this great stuff from a database, but they'll just be staring at a non-authenticated message the whole time, and you can't tell unless they tell you.

> **Material sharing**:
> In the librarian window, click on **Share**. They follow the directions, ie, when you have a Pegasus screen you want to share, make sure you are currently in that window, and click **Ctrl-Shift-F11**. You may also want to type a message to the patron, too.

- Basic will not work with some other web sites as well, both free and licensed. For instance, some sites, like Census Bureau, employ "**frame-busting**" that will "**blow up**" LSSI (this just means you'll lose your console when you open the site, and so lose your interaction with your patron.). For this reason, it is strongly recommended that you not **escort** a basic user to unknown web sites. Rather, go there first yourself, make sure it doesn't "blow-up" or freeze your console, then send them the pages. If you try to go to a page like this, you will get a dialog box that says something like "Do you really want to navigate away from this page?" Don't go, you'll lose the session. If you do go to a web page and it freezes or "blows-up" your page, first try to back up by hitting **alt-backspace** (try it once, then two or three times and see if you recover). If that doesn't work, go back and find the **Sessions in Progress** link, open it, click on the session (assuming your patron is still there), and rejoin the session. Remember, going back to **Sessions in Progress** is as close to a fix all as exists.
- On the patron side, when they get stuck, they may be able to hit the **back** button key (the one on their browser, not in LSSI) ***twice*** to get themselves unstuck. If not, if they relog in to the system using the same email address, there's a good chance LSSI will be able to rejoin the session at the point it went amiss. Generally, whenever the patron tries to naviage away in Basic, it busts the session.

When you are done with a patron

It is recommended that you send the **scripted message** for **goodbye** with its notes about followup. When you are done, or when the patron has disconnected, first click **Exit**, then click **Leave and Close** (we are not doing anything with the resolution codes right now, so don't worry about them). In a few moments, the session will close, and the **sessions in progress** line will go away. **Only use Leave** if you have been in a conference session, and you are leaving but another librarian is still working with a patron (thus is different from transferring a session below). If you **Leave** instead of **Leave and Close**, the session stays open for 4 hours, and the transcript is delayed for that long.

Switching Off with the Next "Live" Librarian

The librarian coming on should log in and start **monitoring** the queue. The person leaving should check the **librarian monitor** (in the **session inbox**) and leave when they see their relief is logged in. When you are leaving, especially the last person for a day, always **logout**! Otherwise, you could close the browser and even the computer, but the service may still appear to be open (as far as I can tell, it doesn't actually stay open, but they say it will).

Transferring a Session to another Librarian

You'll need to pick up the phone and call the other librarian, and have them log on to the system and begin monitoring the queue. Click on **Conference/Transfer**. Select our queue (you won't see the librarians name, but if the librarian has logged in, you'll see the **UCSB Ask a Librarian Live** queue), and you will transfer the session. The other librarian will now have a patron waiting in their queue. When they pick up the patron, they will see all that has gone before and can work with the patron, and you will be disconnected.

Using Scripted Messages

A number of messages are scripted and may be sent as is by anyone. These will be kept to a minimum. You may, however, add your own that you can use anytime you are logged in. For instance, you can log in and edit your **responses**. Or if you write something brilliant during a session that you think you'll want to use again, click the + button to save it as a script.

Current Systemwide Scripted Messages (OK, these need work. Send me stuff. We'll try to figure out a democratic way of making these messages work best for everyone. Not sure how many are too many, etc...)

Script Name	**What it Says**
Welcome	Welcome to the UCSB Libraries live chat reference service. I'm looking at your question right now.
Help you?	How can I help you today?
Just a minute	Hang on for just a minute. I will be right with you.
Great question-pause	That is an excellent question. Give me one minute to think it over.
phone	This one could take awhile. It would be much more effective to finish on the telephone or in person. May I call you; or would you like to call us?
Goodbye	If you need further help, please feel free to contact us. You can call us at 893 2478, or email us at ask@library.ucsb.edu
Hold on, someone's here	Bear with me for a minute: I'm helping another person, too, so I'll be shuffling between the two of you.
Pegasus intro-interact	I'm going to take you to Pegasus now (Pegasus is UCSB's online catalog. It includes all of the library's books and physical holdings, and many of our electronic resources as well. Note that it does NOT know about articles within magazines or journals; it only knows what journals we subscribe to and which issues we own. It also includes circulation information for each item).
Pegasus intro-basic	I'm going to show you some screens from Pegasus now (Pegasus is UCSB's online catalog. It includes all of the library's books and physical holdings, and many of our electronic resources as well. Note that it does NOT know about articles within magazines or journals; it only knows what journals we subscribe to and which issues we own. It also includes circulation information for each item).
Indexes and DBS-intro	Let'a find a database that may help you. These indexes and databases lead to a variety of resources; often, they index all of the articles in the journals on a particular topic.
Proxy intro	While Pegasus is freely available, many of our electronic resources require one to be a current student, faculty, or staff member at UCSB. What this means is that if you are using a computer on the campus network (i.e., you're in the library, a computer lab, a dorm, etc.) you're OK; if you're off-campus, you must use the proxy server to verify that you are from UCSB before you can get in.
Looking at Proxy FAQ	Here's the Proxy Server FAQ page. All you really need to do is look at two things. First, follow the directions on "How do I set up my browser to use the proxy server?." Once you've done this, your need to know your username and password. If you're a student, it's your perm and your pin. If you're faculty or staff, it's a username you can choose via the UCSB directory.
Browser directions	Most people are currently using Internet Explorer, and if you've bought your computer in the last few years, chances are you're using version 5.x. To check your version, open Internet Explorer, and go to "Help" / "About Internet Explorer" from the menu bar at the top. This will tell you what version you have.
Using AOL1	The tricky thing about AOL is that it uses a modified version of Internet Explorer that does not work with the proxy server. What you need to do is start AOL to establish your internet connection, but then start a regular version of Internet Explorer (one should have come with your computer) that is set up to use the proxy server.
Using AOL2	If the blue bar at the top of Internet Explorer says something like "Internet Explorer provided by AOL", that browser will not work. You can try going to the Windows Start menu and doing a Find or Search for the file "iexplore.exe". When you find it, open it and make sure it doesn't mention AOL in the blue bar at the top; then configure this browser to use the proxy server.

AND: there are unlimited permutations of issues and problems. Please send me EVERYTHING you notice that may be a problem, and tell me as much as you know about what the problem is and how it happened (what database, what did you click, etc.).

ILLINOIS

LIBRARY GATEWAY

Virtual Reference Staff Training

RTR Homepage

Important Ready Reference Links

- UIUC Electronic Reference Collection
- Gary Price's "Fast Facts" site
- RefDesk - Scroll about half-way down the page for the good stuff
- Librarian's Index to the Internet

Policies and Start-up

- Download and Installation Instructions For first-time installation of HumanClick.
- Basic Policies

Training Manual

- Getting Started
- More fun with Canned responses

Demonstrations

- Basic HumanClick Features
- More fun with Canned messages.
- Pushing Pages.
-

Troubleshooting

- Troubleshooting - For software problems with HumanClick.
-

University of Illinois at Urbana-Champaign
Library Gateway Homepage
Comments to: VR Staff
Updated on: 01.18.00 DHW
Some Content Borrowed from User Ed Committee

1) Chat: Lesson Plans for Training

Some preliminaries:

- I would suggest having us work in pairs only (juggling multi users is hard to do right away).
- When possible, train in pairs in places where both parties can see both PCs (that is, both the admin and user aspect).
- We need to examine, develop and test canned reply texts.
- We need to identify and present lists of known reliable URLs for bookmarks.

Lesson One (part one): How to log in to Docutek.

At the end of this stage, trainees should know:

- How to log in as an admin <adlogin.html> and go online.
- How to notice and accept new users.
- How to log in as a user <uslogin.html>, and what users will experience.

Lesson One (part two): How to use the instant messaging aspects of VRL.

At the end of this stage, trainees should know:

- How to write simple chat text and send it.
- How the experience "feels" at either end, including effects of time lag, and ambiguous Qs.
- How to use texts to overcome the lack of visual cues, including those that end a transaction.

Lesson Two: Learning to use the canned Replies.

At the end of this stage, trainees should know:

- How to use the search box to find canned replies.
- The naming structure of our array.
- Elements of a good or bad canned text.

Lesson Three: Learning to use canned Bookmarks.

At the end of this stage, trainees should know:

- How to use the search box to find canned bookmarks.
- The naming structure of our array.
- How to display and 'push' pages to users.
- How to use the 'Escort' function.
- Known problems and work-arounds for some key URLs.

Lesson Four: Handling multiple users.

At the end of this stage, trainees should know:

- How to recognize the presence of more than one online user.
- How to use canned replies and bookmarks to meet multiple user needs.
- How to switch from one user to another.
- How to transfer a user to another logged-in admin.

Lesson Five (advanced): Setting up new login names.

At the end of this stage, trainees should know:

- How to create a new login identity.
- Proper format for account names.

Lesson Six (advanced): Writing and editing canned replies.

At the end of this stage, trainees should know:

- How to write a new canned reply.
- What problem characters are not permitted, and how to work around that.
- How to determine a structured name to facilitate searching.
- How to edit an existing canned reply.

Lesson Seven (advanced): Creating new canned Bookmarks.

At the end of this stage, trainees should know:

- How to create a new canned Bookmark.
- How to determine a structured name to facilitate searching.
- What risk factors should be marked to guide other admins.

- How to edit an existing canned Bookmark.

URL = http://intranet.lib.msu.edu/ref/Procedures/lessons.html Last modified on 7/3/02 by sws.

---

2) How to log in as a chat administrator

Before logging in, open two (2) browser windows. You will want one of them for Web surfing and searches outside of the chat software. Use the second to run our chat program.

To enter VRL2.0 as an administrator:

- Go to the main page at http://eref.lib.msu.edu/.
- Click on 'Admin Login'.
- Enter one of the Usernames / Passwords and click on the 'Login' button.

At this point you are on the basic admin screen and have access to all parts of the system. You can created more canned replies or canned bookmarks, create new login identities, or review statistical reports. These will be covered elsewhere.

To function as the on-duty administrator working with online clients:

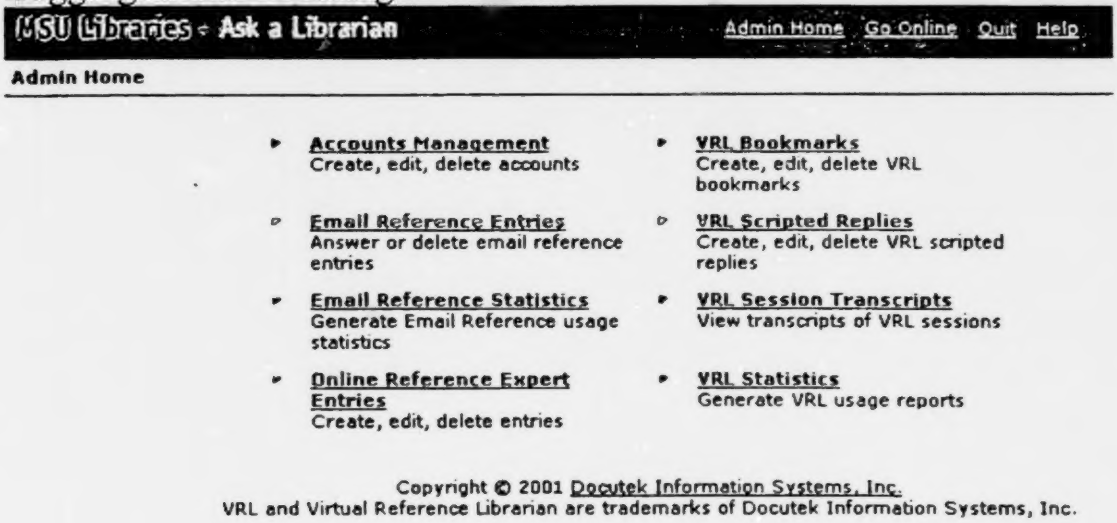
- Click on 'Go Online.'
- A new window will open: size it by finding the Windows box (upper right, between _ and X) and clicking to the two-window option which seems to fit the screen better.
- Check for other active accounts by clicking on the 'Active Users' tab in the lower right. You can see here both library users and other administrators: it is even possible to transfer those users, as we might at a shift change.

To log off:

- Click on 'Go Offline'. You will be returned to the basic admin screen (the other window will close).
- Click on 'Quit'. When you see the message, "You have logged out" you can attend to other work.

URL = http://intranet.lib.msu.edu/ref/Procedures/adlogin.html Last modified on 6/19/02 by sws.

Logging In and Creating an Account


MSU Libraries - Ask a Librarian
Admin Home
Go Online
Quit
Help

Admin Home

- **Accounts Management**
  Create, edit, delete accounts
- **Email Reference Entries**
  Answer or delete email reference entries
- **Email Reference Statistics**
  Generate Email Reference usage statistics
- **Online Reference Expert Entries**
  Create, edit, delete entries
- **VRL Bookmarks**
  Create, edit, delete VRL bookmarks
- **VRL Scripted Replies**
  Create, edit, delete VRL scripted replies
- **VRL Session Transcripts**
  View transcripts of VRL sessions
- **VRL Statistics**
  Generate VRL usage reports

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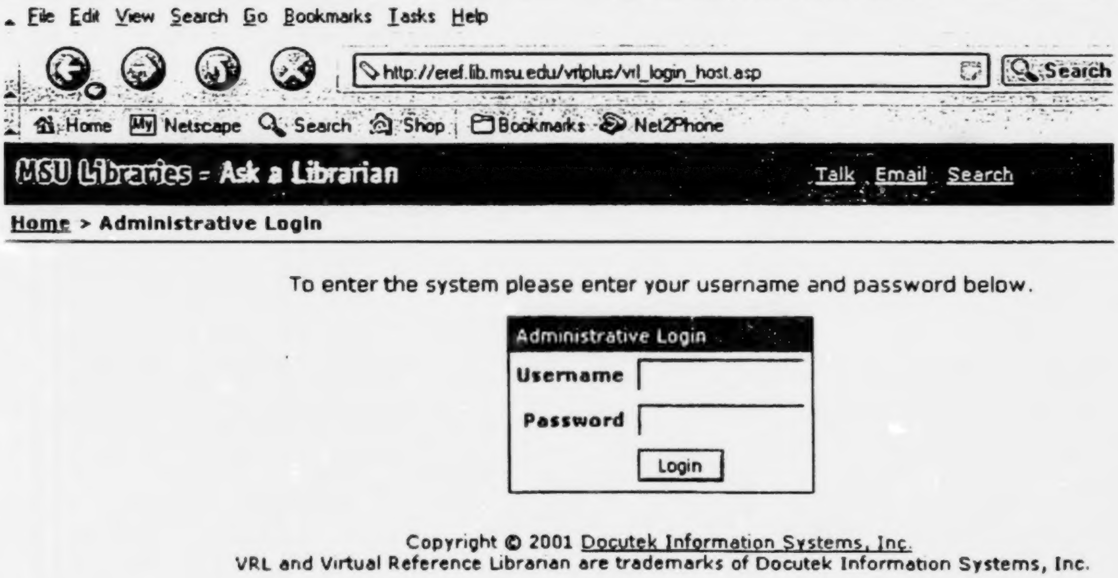
From the Admin Home page, choose Accounts Management.


File
Edit
View
Search
Go
Bookmarks
Tasks
Help
Search
Home
Netscape
Search
Shop
Bookmarks
Net2Phone
MSU Libraries - Ask a Librarian
Talk
Email
Search

http://eref.lib.msu.edu/vrlplus/vrl_login_host.asp

Home > Administrative Login

To enter the system please enter your username and password below.

Administrative Login

Username

Password

Login

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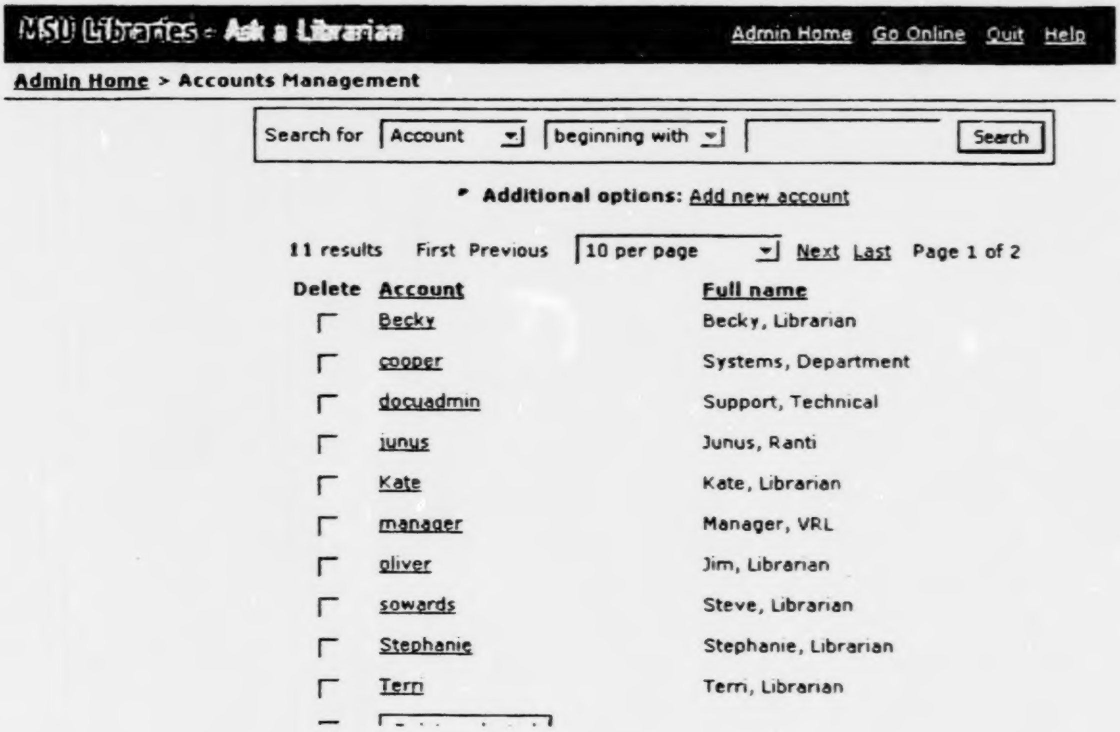
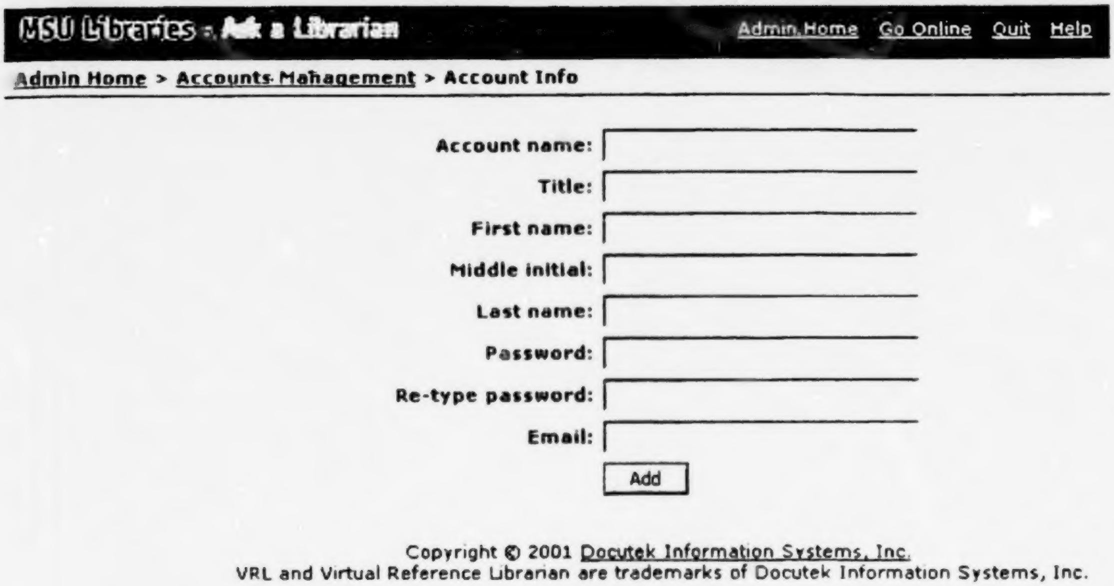
Enter '______ as ' user name and password. After you have done this, click login. You will be taken back to the original screen.

Now when you click Accounts Management you will be taken to a screen where you can set up an account for yourself.


MSU Libraries - Ask a Librarian
Admin Home Go Online Quit Help
Admin Home > Accounts Management
Search for Account beginning with
Search
Additional options: Add new account
11 results First Previous 10 per page Next Last Page 1 of 2

Delete	Account	Full name
☐	Becky	Becky, Librarian
☐	cooper	Systems, Department
☐	docuadmin	Support, Technical
☐	junus	Junus, Ranti
☐	Kate	Kate, Librarian
☐	manager	Manager, VRL
☐	oliver	Jim, Librarian
☐	sowards	Steve, Librarian
☐	Stephanie	Stephanie, Librarian
☐	Terri	Terri, Librarian

Click on Add new account.



Admin Home > Accounts Management > Account Info

Account name:
Title:
First name:
Middle initial:
Last name:
Password:
Re-type password:
Email:

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Now create your account name. This is the name that will display in the script in chat and patrons will see. Everyone should enter **Librarian as first name** and either **your first name or initials in last name**. This will display as "Librarian (Your First Name)" or "Librarian (your initials)."

In account name, enter the name you signed in with.

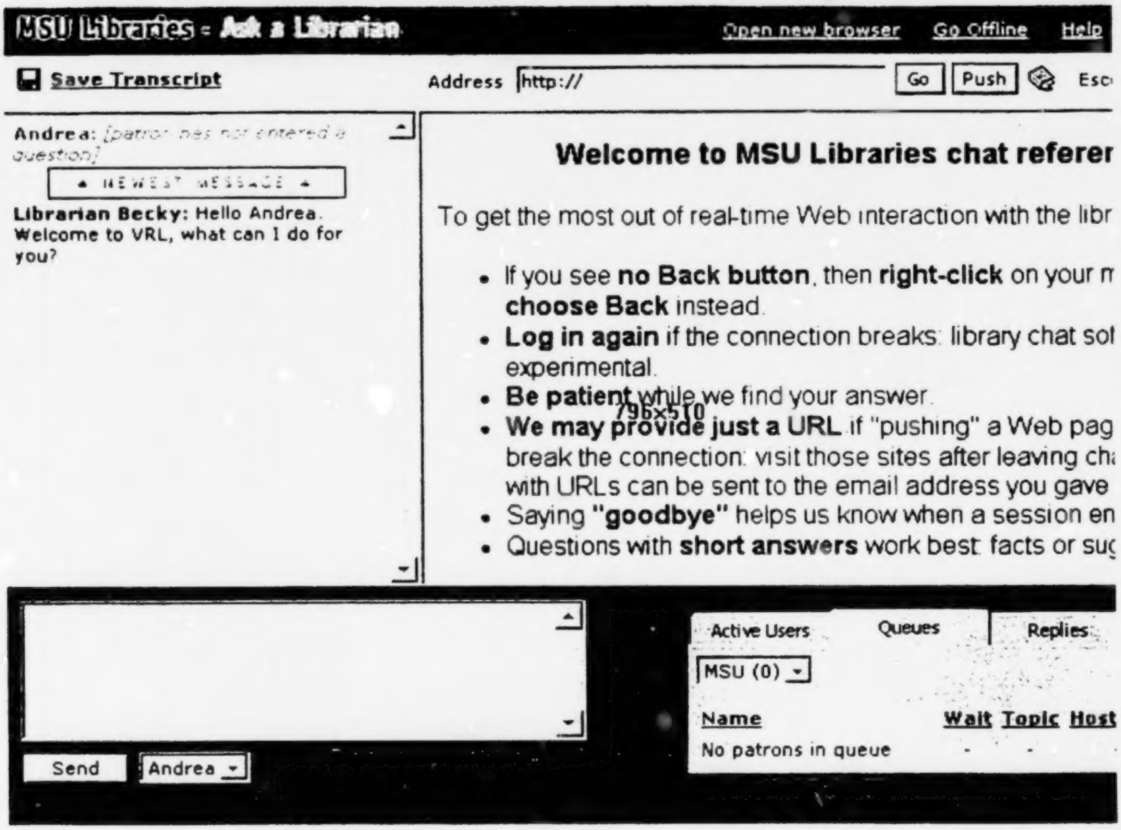
Don't enter anything in title

Enter first name Librarian

No middle intitial

Enter your first name or initials

This is how names entered this way will appear to the patron and in the transcript.


MSU Libraries - Ask a Librarian
Open new browser
Go Offline
Help
Save Transcript
Address
http://
Go
Push
Esc
▲ NEWEST MESSAGE ▲
796x510
Send
Andrea
Active Users
Queues
Replies
MSU (0)
Name
Wait
Topic
Host
No patrons in queue

Andrea: *[patron has not entered a question]*

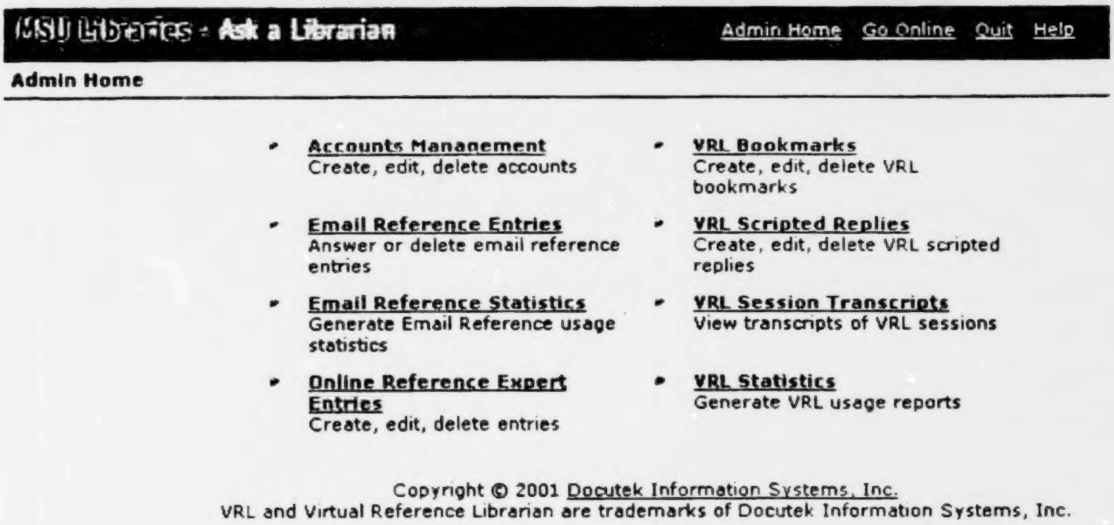
Librarian Becky: Hello Andrea. Welcome to VRL, what can I do for you?

Welcome to MSU Libraries chat referer

To get the most out of real-time Web interaction with the libr

- If you see **no Back button**, then **right-click** on your m **choose Back** instead.
- **Log in again** if the connection breaks: library chat sol experimental.
- **Be patient** while we find your answer.
- **We may provide just a URL** if "pushing" a Web pag break the connection: visit those sites after leaving ch with URLs can be sent to the email address you gave
- Saying **"goodbye"** helps us know when a session en
- Questions with **short answers** work best: facts or su

Go Online



Admin Home

- **Accounts Management**
  Create, edit, delete accounts
- **Email Reference Entries**
  Answer or delete email reference entries
- **Email Reference Statistics**
  Generate Email Reference usage statistics
- **Online Reference Expert Entries**
  Create, edit, delete entries
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  Generate VRL usage reports

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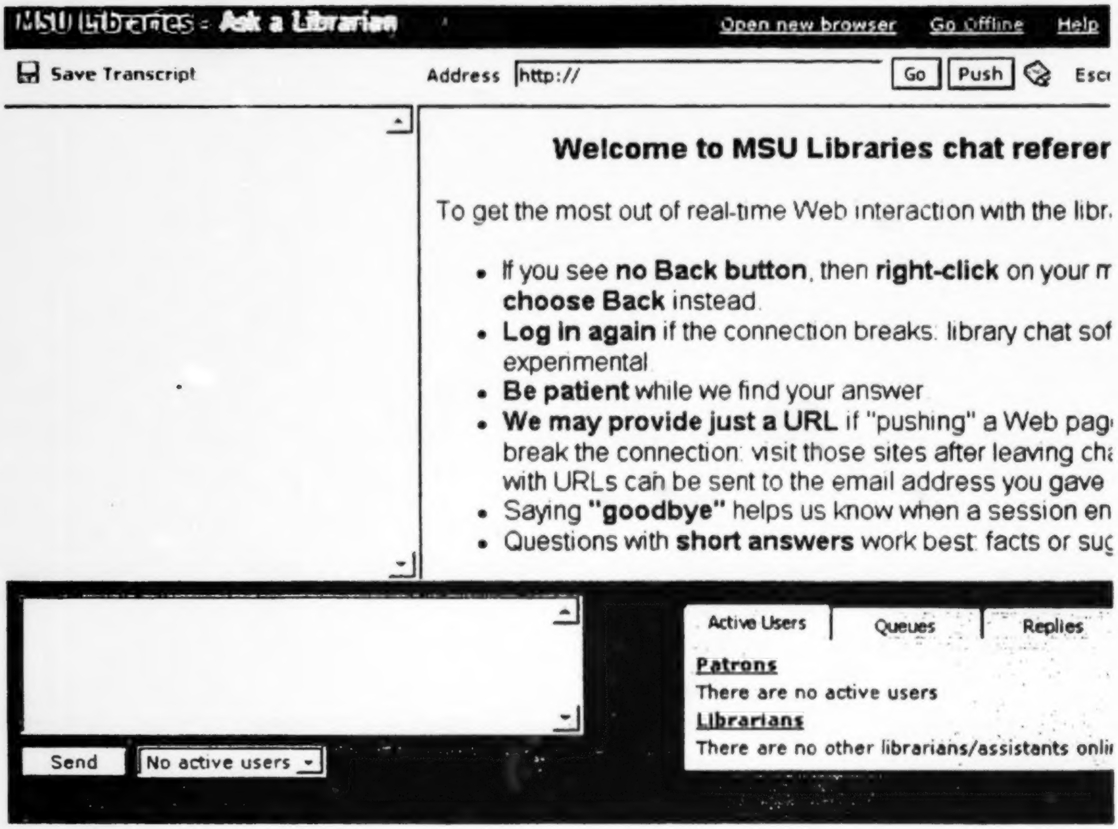
After you have a password, you're ready to go online. Click Go Online on the top row of choices next to Admin Home.

Another window will open with this screen.


MSU Libraries - Ask a Librarian
Open new browser
Go Offline
Help
Save Transcript
Address
http://
Go
Push
Esc
Active Users
Queues
Replies
Send
No active users

Welcome to MSU Libraries chat referer

To get the most out of real-time Web interaction with the libr

- If you see **no Back button**, then **right-click** on your m **choose Back** instead.
- **Log in again** if the connection breaks: library chat sof experimental.
- **Be patient** while we find your answer.
- **We may provide just a URL** if "pushing" a Web pag break the connection: visit those sites after leaving ch with URLs can be sent to the email address you gave
- Saying **"goodbye"** helps us know when a session en
- Questions with **short answers** work best: facts or su

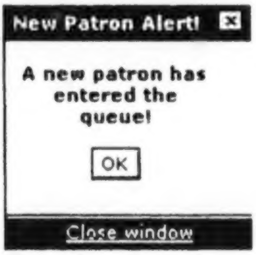
Patrons

There are no active users

Librarians

There are no other librarians/assistants onli

Now the you're online and ready for a patron.

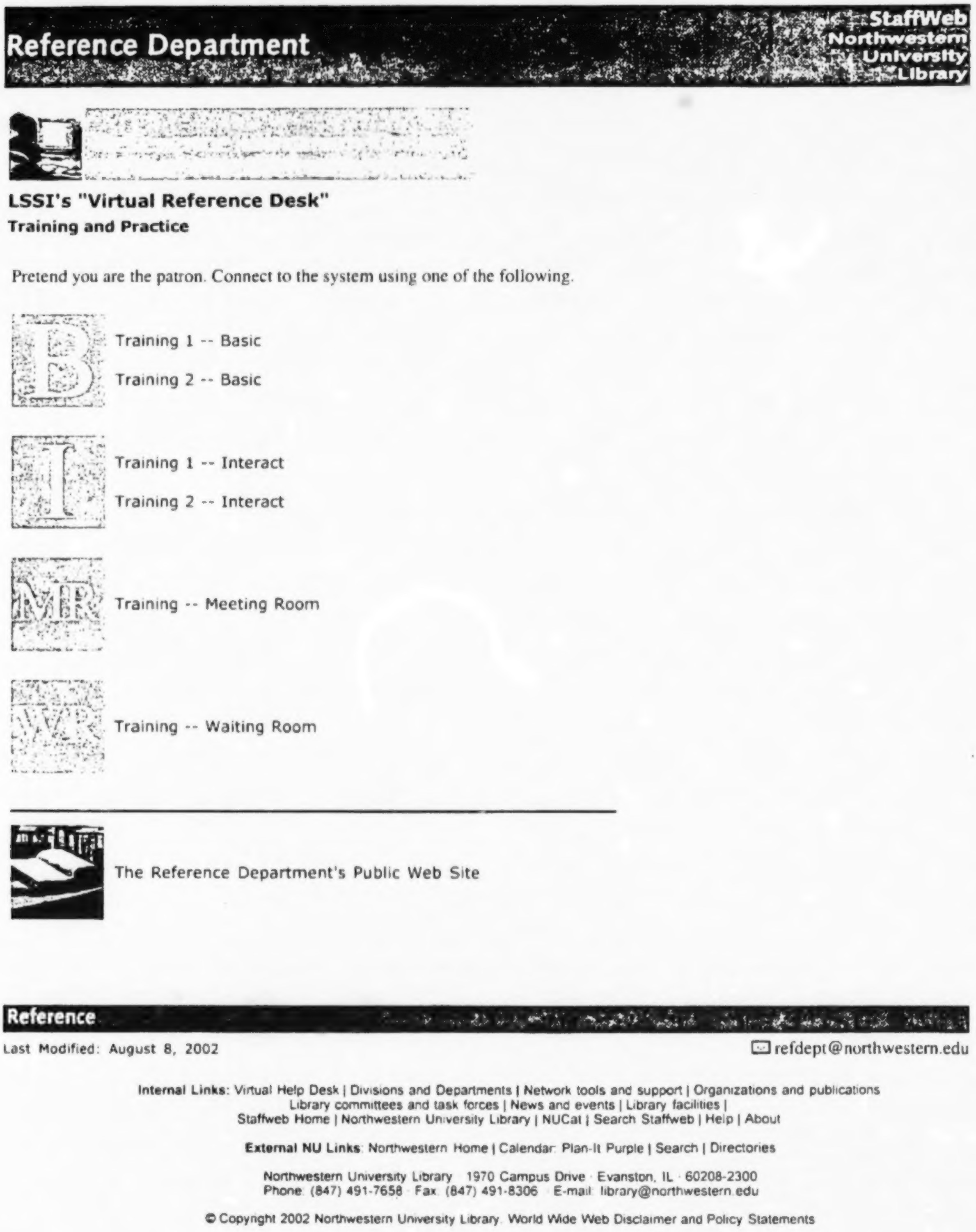

New Patron Alert!
OK
Close window

A new patron has entered the queue!

When a patron logs on a box will come up to tell you and it will also "ding" to get your attention. So you shouldn't worry that you'll miss a patron if you get busy with something else on your computer or in your office.

Click OK.

After you click OK, you should see the patron appear in the lower right box under **Patrons**.



LSSI's "Virtual Reference Desk"

Training and Practice

Pretend you are the patron. Connect to the system using one of the following.

- Training 1 -- Basic
- Training 2 -- Basic
- Training 1 -- Interact
- Training 2 -- Interact
- Training -- Meeting Room
- Training -- Waiting Room

The Reference Department's Public Web Site

Last Modified: August 8, 2002

refdept@northwestern.edu

Internal Links: Virtual Help Desk | Divisions and Departments | Network tools and support | Organizations and publications
Library committees and task forces | News and events | Library facilities |
Staffweb Home | Northwestern University Library | NUCat | Search Staffweb | Help | About

External NU Links: Northwestern Home | Calendar: Plan-It Purple | Search | Directories

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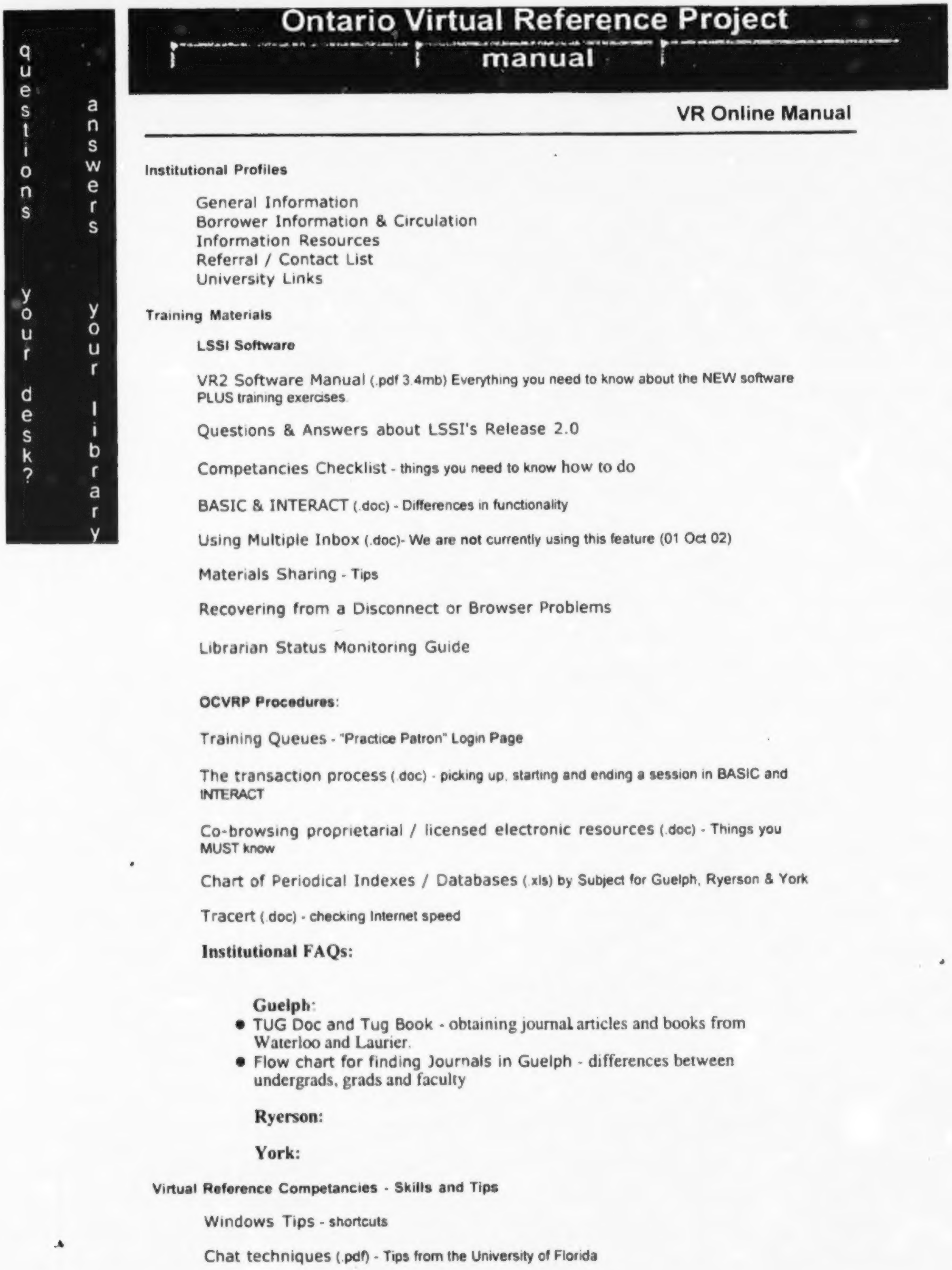
ONTARIO VIRTUAL REFERENCE PROJECT

http://alpha.lib.uoguelph.ca/reference/OCUL/vrmanual.html



Ontario Virtual Reference Project

manual

VR Online Manual

Institutional Profiles

General Information
Borrower Information & Circulation
Information Resources
Referral / Contact List
University Links

Training Materials

LSSI Software

VR2 Software Manual (.pdf 3.4mb) Everything you need to know about the NEW software PLUS training exercises.

Questions & Answers about LSSI's Release 2.0

Competancies Checklist - things you need to know how to do

BASIC & INTERACT (.doc) - Differences in functionality

Using Multiple Inbox (.doc)- We are not currently using this feature (01 Oct 02)

Materials Sharing - Tips

Recovering from a Disconnect or Browser Problems

Librarian Status Monitoring Guide

OCVRP Procedures:

Training Queues - "Practice Patron" Login Page

The transaction process (.doc) - picking up, starting and ending a session in BASIC and INTERACT

Co-browsing proprietarial / licensed electronic resources (.doc) - Things you MUST know

Chart of Periodical Indexes / Databases (.xls) by Subject for Guelph, Ryerson & York

Tracert (.doc) - checking Internet speed

Institutional FAQs:

Guelph:
- TUG Doc and Tug Book - obtaining journal articles and books from Waterloo and Laurier.
- Flow chart for finding Journals in Guelph - differences between undergrads, grads and faculty

Ryerson:

York:

Virtual Reference Competancies - Skills and Tips

Windows Tips - shortcuts

Chat techniques (.pdf) - Tips from the University of Florida

Decision Tree for Complex Questions and Time Consuming Research

Reference Interview in the Digital Library: a bibliography

Reference Success in a Virtual Environment (.pdf)

The Seven Habits of Highly Effective Virtual Librarians

Virtual Reference Interview: Equivalencies

Policies and Guidelines

Click HERE for information on scheduling and staffing, clientele served, questions, answering and referral, reporting problems, service standards, system wide message scripts and privacy.

General Information and Gateways

LiveREF: a registry of Real Time Digital Reference Services (and bibliographies and resources on real time reference)

Other Collaborative Live Reference Services

The Teaching Librarian: Digital Reference

The Virtual Reference Desk

For more information contact
Jennifer Marvin (Guelph), Diane Granfield (Ryerson), Mark Robertson (York)

SYRACUSE UNIVERSITY LIBRARY

LibChat Table of Contents

LibChat Information

Before you begin

- **Use Internet Explorer version 5.x** when logging in as a staff member. If you log in using Netscape, you will encounter problems. If you do not have Internet Explorer on your computer, please contact Donna Sullivan (x9521). Patrons may use Netscape or Internet Explorer, but library staff must use Internet Explorer.
- **Change your monitor resolution** before starting a session; this will prevent you from having to resize the windows. To change settings:
    - Minimize all windows;
    - Right click on desktop;
    - Select Properties;
    - Click on the Settings tab;
    - Slide the Desktop area bar to 1024 x 768;
    - Click OK.

  When you are finished with the chat session, you may slide the bar back to 800 x 600.
- Check your Internet Explorer settings. (click on link for instructions)

Staff Login

To Login:

1. Click on **http://syracuse.247ref.org/wcs**
2. Enter your first name as username and syracuse as password. Click Login.

   As you log in, you may see gray boxes asking questions such as: "When you send information to the Internet, it might be possible for others to see that information. Do you want to continue?" You may click "yes" for any of these messages you encounter. You may also opt not to receive this message again.
3. Click on the **red arrow** next to "Session Inbox." The Category Selection Box will

open.

4. Highlight **SYRACUSE** in the Category Selection box, then click on Monitor. Do not click on Monitor without selecting at least one category.

5. Your Session Inbox will open in a new window. Maximize the window.

6. In the Session Inbox, click on the **Available** button; a check mark will appear in the box. You are now ready to accept questions.

7. Explore the Settings icon on the right side of the screen. Click the **Settings** button to choose how you wish to be notified of a new patron.

8. Note the happy green status face. The face should flash every 7 to 8 seconds from green to red. If the face remains green without flashing or if it turns red and stays red, the software has logged you out. If this happens simply click on the Reselect icon and follow the instructions beginning with step 4, selecting SYRACUSE as the channel to monitor.

9. Notice the columns "**on hold**" and "**wait**." When a number appears in the "wait" column, click on the category name (SYRACUSE) in the Waiting Room.

10. Click on patron's name to connect and begin the chat session. The Staff console will open.
Please note: If you did not change your monitor resolution before you logged in to the chat session, you may need to drag the console window to the top of your screen.

▲

Error Report Form

If you have any problem with the chat software during your shift, please fill out the Error Report Form so we can ask 24/7 Reference to address the problem.

▲

Schedules

Service Schedule

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday
4 - 8	12 - 9	12 - 9	12 - 9	12 - 2	12 - 5

Personal Schedule

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday
12 - 1	CLOSED	Charu	Uma	Jacquie	Tasha	Cindy
1 - 3		Nancy	Jacquie	Kelly	Elaine (1-2)	Michael
3 - 5		Wendy	Suzanne	Donna	CLOSED	Action Team rotate
5 - 7	David (4-6)	David	David	David	CLOSED	
7 - 9	David (6-8)	Darle and Librarian on duty	Darle and Librarian on duty	Darle and Librarian on duty		

Tech Support Schedule

Troubleshooting available 11:00 - 8:00 PM EST
Carol Bonnefil 310-391-7444
carol@247ref.org

Text pager is available after hours.

Ending A Session

1. When you and your patron are ready to end your chat session:

- Click Exit (upper right corner of the chat screen);
- Select an appropriate Call Resolution. At the moment, the choices are:
    - Successful:
    - Transferred in:
    - Transferred out:
    - Test:
- Click the **Exit and close** button, which is below the call resolution window.
- You will see a pop-up window asking if you would like to send a transcript of the session to yourself. This transcript will provide you (or the staff member to whom you may be referring the question) with information required for follow up.
- Be patient - after a few seconds you will automatically return to the Session Inbox and can start a session with another patron.

2. When your shift is over:

- If possible, end whatever chat session you are having with a patron by following the above directions for closing a session;
- After returning to the Session Inbox, click Logout.

3. If you and your patron have not finished the chat session and you would like to transfer the patron to the next scheduled staff member:

- Click on the Cnf/Trn button Cnf/Trn (located on the right side of the chat session screen) ;
- Scroll through the list and select Syracuse.
- Scroll to the bottom of the screen and click on:
  - Conference, if you want to remain in the session with the patron and the incoming staff member;
  - Transfer, if you simply want to transfer without continuing the conversation.
- After conferencing or transferring, log out by clicking on: "Leave the session without closing."
  Please note that this logout procedure differs from the procedure described in #1 (above).

Under our current licensing agreement, for a brief period of time two people will be allowed to log in as staff to allow for shift changes and transfers. In general, however, only one staff person may log in at a time; it is important that you do not log in during someone else's shift without talking with them first.

Patron Login

Go to Reference Services via any ? ASK US! icon and click on "LibChat Online Reference" to begin a chat session.

Adding or Editing Your Scripted Messages/URLs

You do not need to be engaged in a chat session to customize your scripts and URLs. You may create and save scripts and URLs **at any time** by going to the administrative module at http://www.247ref.org/info. You will see the following choices:

- User Information
- User Screens (URLs)
- User Messages

The above links enable you to customize information about yourself and create scripted messages and links of your own, which will appear each time you log in. Note that you cannot change the system-wide messages.

We welcome script suggestions. If you find that you are repeatedly typing the same message of your own and think it should be added to the list for all of us to share, please contact Suzanne Preate (or post your suggestion to the LibChat list).

24/7 Reference Manual (2 versions)

This is the manual we received from the vendor, 24/7 Reference. We have customized our "manual" for SUL users. Please refer to our documentation if you have specific questions about the service. The 24/7 Reference manual can be useful for a broad overview of the system and its functionality.

HTML version **PDF version**

- Workstation Settings
- Librarian Login Procedure
- Patron Login and Interface
- Activate a Session
- Librarian Interface
- Meetings
- Ending the Session

Last modified: Tuesday, 12-Feb-2002 11:48:26 EST
© 2001 - Syracuse University Library
URL: http://libtest.syr.edu /information/reference/chat.html

LiveRef Procedures and Policies – Draft 1

Procedures

Opening

1. Double-click the LiveRef icon on the desktop.
2. The login dialog box will appear. If it's not already filled in, fill it in with in the ID box and in the password box. Click "Login."
3. The LivePerson operator's window will appear. If **Online** isn't displaying in the _____ pull-down menu, select it to go online.

Chatting

Generally, the operator sends messages by typing text in the operator's text box and clicking "Send" to send the message.

1. When a call is coming in, you'll be alerted with a telephone-like ringing sound. Click on the "Accept" button to accept the call. You may refuse a call by clicking on the "Refuse" button, when you're already stressed out by other calls and one more call would put you over the edge.

   Accepting a call automatically sends a message to the inquisitive chatter indicating you're ready and waiting for the question.

2. Wait for the eager chatter's question
   or
   Send the anxious chatter a soothing greeting by typing and sending it, or by using a canned greeting.

   Canned messages are sent automatically, without an option to edit the message, when selected from the "Canned" menu in the top menu bar. You may edit a canned message by selecting it using the can button, located at the extreme right of the row of text-formatting buttons immediately above the message box.

3. Chatiquette - Conduct the chat as you would a regular reference interview, keeping the following in mind:
   - The chatter, in its natural habitat, is a skittish, impatient creature and expects quick, snappy, preferably hip repartee. If you take too long to formulate a response, the nervous chatter may interrupt you with proddings wondering what happened to you, or may get spooked and run away. Avoid this by keeping answers short, or by breaking up a long response and sending it as shorter bits. The more worldly-wise chatter…
     may recognize ellipses …
     at the end of a phrase…

as indicative that you've sent only part of a response...
and that there's more to come.

- If you have to search for something and know it's going to take significant time, warn the apprehensive chatter. Some canned responses, such as "On Hold," serve this purpose well. Remember: the easily-distracted chatter likely has a short attention span, and won't wait long for you.
- Chatting is not conducive to long instructional how-to explanations. If you sense extensive instruction is involved, encourage the naturally timid chatter to pick up the phone or send e-mail. You might even suggest he/she come to the library, or if already in the library, go to the reference desk, but the shy chatter may be reluctant to endure actual human contact.

4. You may end the chat by clicking the "Stop" button in the main toolbar. Sometimes it's hard to determine that the unpredictable chatter is actually finished, so you may wish to wait for him/her to end the chat, which he/she may/may not do by closing the chat window on his/her computer.

Closing

Turn off LiveRef by selecting "Exit" from the "File" menu. This is important; if you don't do this, the service may remain active after hours, and the easily-befuddled chatter may become befuddled when no operator responds. Exiting properly also activates two things:

- The connect button on the LiveRef page indicates no operators are available, and
- The verbose chatter, upon opening the chat window, will be presented with the option to send e-mail instead of chatting.

Advice to the green operator:

- Know your way around the Library Web. You must be quick. Portions of the Library Web to be particularly familiar with are:
  - Online service forms, available from the "Questions & Forms" page and elsewhere
  - Databases lists and databases
  - Electronic Journals database
  - ILLiad
  - Proxy Server Configuration page
  - Addison
- Know the canned responses. You must be quick – the canned responses can help you with this.
- Know how to type. You must be quick. Proper spelling, grammar, and articulation are important, but much less so than being quick. Most

chatters seem pretty shameless about their own typing, spelling, and grammar skills, but are usually quick.

- Know how to push pages. "Pushing a page" is a quick method to make the page with the appropriate information appear on the pushy chatter's monitor.

  To push a page, click on the large square "Push" button at the top of the window. A dialog box with a space for the URL appears. Copy/paste or type the URL into the text box and click "Send".

- Did I mention that you must be quick?

Policies

Hours: Hours are limited. Current hours are posted on the "Online Reference Service: LiveRef and AskUs" web page at http://www.lib.vt.edu/services/liveref.html.

Audience: Priority when answering questions is given to Virginia Tech students, faculty, and staff, and to questions pertaining to and answerable with use of Virginia Tech library collections. Questions from outside Virginia Tech may be answered as well, at the discretion of the operator. As resources are often restricted by license to use by affiliates of Virginia Tech, non-affiliates often will not have access. This is to be taken into consideration when answering questions asked by non-affiliates.

Scope: LiveRef is most conducive to providing short answers to brief factual and ready-reference questions, questions about the libraries, or questions about or using its catalogs, databases, and websites. In-depth research or database searching, document delivery, and patron account problems are outside the scope of the service. Appropriate referrals should be made upon receipt of questions of this nature, or the caller should be advised to use e-mail or the telephone, or to visit the library in person.

WASHINGTON RESEARCH LIBRARY CONSORTIUM

http://www.wrlc.org/virtualref/vrguidelines.html

Guidelines for WRLC Virtual Reference Librarians

ASK A LIBRARIAN
hours: M-Th 12-6pm & F 1-5pm

BEFORE BEGINNING VIRTUAL REFERENCE: Step 1
Check you computer to make sure it is up to system requirement. System Requirements for Librarian PC are: Ø Pentium 200 MHz or higher Ø 128 Mbytes RAM Ø Windows NT 4.0 with Service Pack 5 or higher. Windows 98. Windows 2000. or Windows ME Ø Microsoft Internet Explorer 5.0. 5.5 (IE 6.0 is not yet supported) Ø 56K or better internet connection Ø AOL. Netscape. and Web TV browsers are not supported System Requirements for Patron PC. Live (Basic) queues have the following requirements: Ø 28K or better Internet connection Ø Microsoft Internet Explorer 4. Netscape 4 or later browser Interact queues will add collaboration on pages using SSL. dynamic content. and other advanced features but adds the following constraints: Ø Client machines must be configured to allow JavaScript and cookies (see the Verify Browser Configuration section. pg. 4.) Ø Netscape and IE browsers on the Macintosh are not supported

BEFORE BEGINNING VIRTUAL REFERENCE: Step 2
Follow "Recommended System Configuration for the Librarian Desktop" on pages 12-17 of the LSSI training manual. If you have any questions about this please contact your virtual reference librarian mentor. post a questions to the wrlcref listserv. or email Avril Cunningham Stillion at avril@gwu.edu.

1.
Check the virtual reference calendar at calendar.yahoo.com. Sign in with ID and password distributed on the wrlcref listserv by Vera Fullerton via e-mail titled " Virtual Reference Pilot - Scheduling" on March 29. 2002. Please keep the virtual reference calendar updated with your hour shifts. If you need to switch shifts please contact other virtual librarians via the listserv wrlcref@yahoogroups.com to accomplish a trade. After trade is accomplished you must make changes in the virtual reference calendar at calendar.yahoo.com

2.
Read the wrlcref listserv e-mail daily. Please send tips to share. shift reports. and information other virtual librarians may find useful during their virtual reference session directly to wrlcref@wrlc.org

3.
Report technical issues or LSSI configuration problems to David Bietila at bietila@wrlc.org. Please cc wrlcref@wrlc.org to keep other virtual reference librarians informed of problems that have already been reported and are being worked on.

4.
Remember to log in go to wrlc.virtualreference.net. Log on with your first initial in caps. last initial in caps and rest of your last name in lower case Use the password distributed by David Bietila via e-mail titled "Virtual Reference Announcement" on Tuesday. March 26. 2002 4:38 PM.

5.
After logging in. please go to the Session Inbox to pick up all 6 queues. Highlight AU. CU. DC. GA. GW. MU in blue by hitting SHIFT and clicking all 6 queues. Use the blue + sign to move over to the monitor category. Click Monitor and all 6 queues are routed to your session inbox. If you see the message *"Rep 'Librarian' is already logged in. Please log in as a different user. Click here if you want to force the log out"* . this means that the previous librarian has not logged out or is still in the middle of helping a patron/monitoring a queue. Click on Librarian Monitor to see if a call is indeed in progress. •We recommend not placing a check mark in the box "I am available to assist patrons" unless you want all new customers to automatically be picked up. Rather. leave the box unchecked and you will able to pick up a patron in the queue when you are ready to assist them.

6.
Please use the University of Florida chat suggestions as guidelines for your virtual reference service. If a patron's question requires a licensed database. escort the patron to www.aladin.wrlc.org and ask the patron to validate themself. NEVER VALIDATE A PATRON WITH YOUR OWN NUMBER. You may push the script "Database Log In " to prompt the patron to log in to the databases s/he is authorized to use. If you are unfamiliar with the patron's database resources. you may push the script "Not Familiar" and explore with the patron. Alternatively. if you are not comfortable exploring with the patron. please redirect the patron to their consortium school with a subscription to the database and recommend they consult a librarian more familiar with the resource.

7.
George Mason virtual patrons should be automatically sent to the separate GM Ask A Librarian service. LSSI has registered the IP address and Aladin Log Ins to their separate queue and service. Should you have a virtual patron who identifies as a George Mason patron. please go to http://library.gmu.edu/ and highlight the Ask A Librarian button. Encourage the patron to use this service.

8.
Suggested Time Limit: We do not currently have a suggested time limit stated on the Ask A Librarian home page. Research from the virtual reference pilot project indicates an average session is **13 minutes**. This is not a hard and fast rule. but a guideline. Librarians may use their own judgment in this area. If there is nobody in the queue waiting and the patron is willing to stay connected. the transaction may go longer. Also. based on our pilot statistics. a patron will not wait more than 2 minutes and 30 seconds for their call to be picked up. If you are helping a virtual patron and another patron is waiting. please consider using the script "Is this enough to get you s tarted?". You can always take the email or phone number and get back to a patron or alternatively ask them to log back in for further questions. If you feel comfortable. you may also pick up the second patron and toggle between both patrons in separate browsers while searching and answering questions. The Virtual Reference Working Group will be evaluating the number of calls received during shift and will make adjustments to this policy if warranted.

9.
Try to become familiar with the set of databases that many. but not all. WRLC libraries have in common. Consult the help guides or tutorials.

☐ ABI Inform/Complete: http://www.geocities.com/acunningha/bi/abi.doc
☐ ERIC : http://www.gwu.edu/gelman/guides/database/eric
☐ MLA: http://gateway.library.uiuc.edu/mdx/mlahelp.htm
☐ PsycINFO: http://www.lib.monash.edu.au/vl/psyin/psyincon.htm
☐ Periodical Abstracts/ Proquest General Reference: http://www.gwu.edu/gelman/guides/database/pa/
☐ Lexis Nexis Academic Universe (MU does not subscribe): http://www.gwu.edu/gelman/guides/database/lexis/
☐ JSTOR (MU and GA do not subscribe): http://www.gwu.edu/gelman/guides/database/jstor/

10.
Use the WRLC Libraries Information and Web sites page at http://www.wrlc.org/guidetolibs/guideintro.html to find reference, circulation, and Interlibrary Loan phone numbers as well as general policies relating to each WRLC library. Please refer circulation questions to the circulation number of their home institution. Circulation phone numbers can be found at http://www.wrlc.org/guidetolibs/guideintro.html. Remember, you may also show a patron how to log in to their MyAladin record to view preliminary information about their circulation record, such as which books they have checked out, CLS requests, and web document delivery articles that are available.

- **AU** Circulation 202-885-3221
- Reference 202-885-3238
- Interlibrary Loan 202-885-3240 202-885-3852
- http://www.library.american.edu/about/services/ill/

- **CU** Circulation (Access Services) 202-319-5060
- Reference 202-319-5070
- Interlibrary Loan 202-319-5063:Fax 319-6101
- http://libraries.cua.edu/usinglib.html#ill

- **GA** Circulation, Reserve, & Reference 202-651-5217 (voice) 202-651-5216 (TTY)*
- GA Consortium Loan & ILL 202-651-5235 (TTY)*

- **GW** Circulation Desk 202-994-6840
- Reference 202-994-6558 (Press Option 7)
- Consortium Loan Service 202-994-1306
- Interlibrary Loan service (202) 994-7128
- http://www.gwu.edu/gelman/service/interlibrary/

- **MU** Circulation Desk 703-284-1533
- Reference 703-284-1649
- MU Interlibrary Loan 703-284-1641

- **UDC** Circulation Services 202-274-6009
- Reference 202-274-5104
- ILL 202-274-6011

11.
If you refer a patron to a WRLC library for walk in service, please check the "Library Regulations". Copy and paste the library regulations text and send to patron so they are aware of materials they must bring, i.e. WRLC library ID's or procedures they must follow, such as signing in at the front desk. The Library Regulations can be found at http://[illegible]ww.wrlc.org/guidetolibs/guideintro.html under the link Summary Library Information

12.
Please configure your settings in the Session Inbox to "play sound when patrons are waiting". The system will make a doorbell sound when a patron arrives in a queue and will continue to play until the patron is helped. Also configure your "pop to front" setting as "on first arrival". The session inbox screen will automatically pop to the front of your desktop when all the queues you are monitoring are empty and a patron arrives. Please refer to pg. 20 of the LSSI manual for further explanation.

13.
Please take note of whether the patron you are helping is in [B] Basic or [I] Interact mode. This indicates which features of the LSSI system you are able to use during the session : live chat, escort, co-browsing etc. To review your patron's mode, check under the Attendees box on the lower left hand corner of the Librarian Console for a [B] or [I].

14.
Please log out properly when your shift is ending. If you are still involved with a customer at the end of your shift, at your discretion, you may continue to help the customer if you determine that the question can be closed out quickly. Or, if you cannot complete the transaction and the customer would like to continue, offer to transfer the patron back into the queue (i.e. "place them on hold") where the next librarian will pick them up. For detailed instruction please consult page 55 of the LSSI manual. When you finish your session with the patron either by ending the call or transferring, please go to the Session Inbox screen and click the Log out button [X] located at the top right hand of the screen.

15.
Thank you for your willingness to staff the virtual reference service! If you have any questions, concerns, or comments, please feel free to email the group at wrlcref@wrlc.org. You will find a lot of help among your virtual reference colleagues.

UNIVERSITY OF WISCONSIN–MADISON

http://www.library.wisc.edu:4000/help/livehelp/

Live Help
Virtual Reference Desk

FAQ
Calendars
Meetings
Quickguide
Documentation

ONLINE REFERENCE LIBRARIANS

Online Reference Staff, with library affiliations, Fall 2002

Staff names, email, phone and library affiliation Spring2002

FAQ

Scavenger Hunt word document from Wendt 10/16/02

How do I get the software? Staff (agent software 3.2.6) UW-community (companion)

Newest software Staff (agent software 3.2.12)

The button on this page is associated only with the training account, train10. Use this for practice with other operators.

Training & Practice tips

FAQ for public users

MadCat Response Team: help with pesky MadCat and WebZ questions.

Web pages and databases registered with Convey Systems

CALENDARS

Schedule by Library, Fall 2002

MEETINGS

QUICK GUIDE

Convey Pro Interface, Quick Guide

Live Help Flyer promotional, Live Help Bookmark (word documents)

DOCUMENTATION

Live Help help, guides to unfamiliar subjects and databases

New Agent Accounts

Pro Interface Training Manual of Convey Systems (ver 3.1.45)

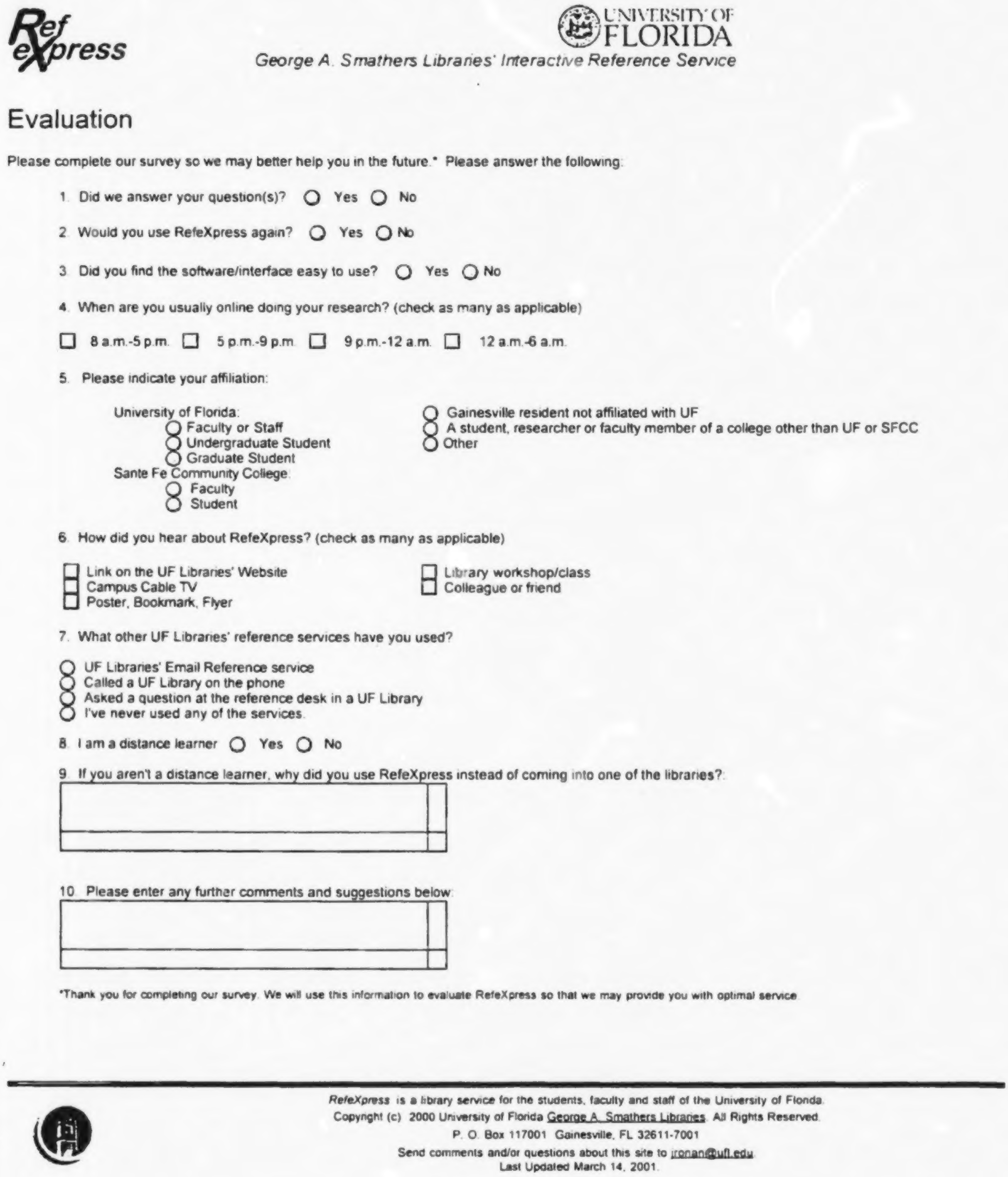
Convey System Users Group Listserv Documentation

Libraries Live Help Top

Evaluation

UNIVERSITY OF FLORIDA

http://refexpress.uflib.ufl.edu/rxevalform.html



RefeXpress

UNIVERSITY OF FLORIDA

George A. Smathers Libraries' Interactive Reference Service

Evaluation

Please complete our survey so we may better help you in the future.* Please answer the following:

1. Did we answer your question(s)? ○ Yes ○ No
2. Would you use RefeXpress again? ○ Yes ○ No
3. Did you find the software/interface easy to use? ○ Yes ○ No
4. When are you usually online doing your research? (check as many as applicable)

☐ 8 a.m.-5 p.m. ☐ 5 p.m.-9 p.m. ☐ 9 p.m.-12 a.m. ☐ 12 a.m.-6 a.m.

5. Please indicate your affiliation:

University of Florida:
- ○ Faculty or Staff
- ○ Undergraduate Student
- ○ Graduate Student

Sante Fe Community College:
- ○ Faculty
- ○ Student

○ Gainesville resident not affiliated with UF
○ A student, researcher or faculty member of a college other than UF or SFCC
○ Other

6. How did you hear about RefeXpress? (check as many as applicable)

☐ Link on the UF Libraries' Website
☐ Campus Cable TV
☐ Poster, Bookmark, Flyer
☐ Library workshop/class
☐ Colleague or friend

7. What other UF Libraries' reference services have you used?

○ UF Libraries' Email Reference service
○ Called a UF Library on the phone
○ Asked a question at the reference desk in a UF Library
○ I've never used any of the services.

8. I am a distance learner ○ Yes ○ No

9. If you aren't a distance learner, why did you use RefeXpress instead of coming into one of the libraries?

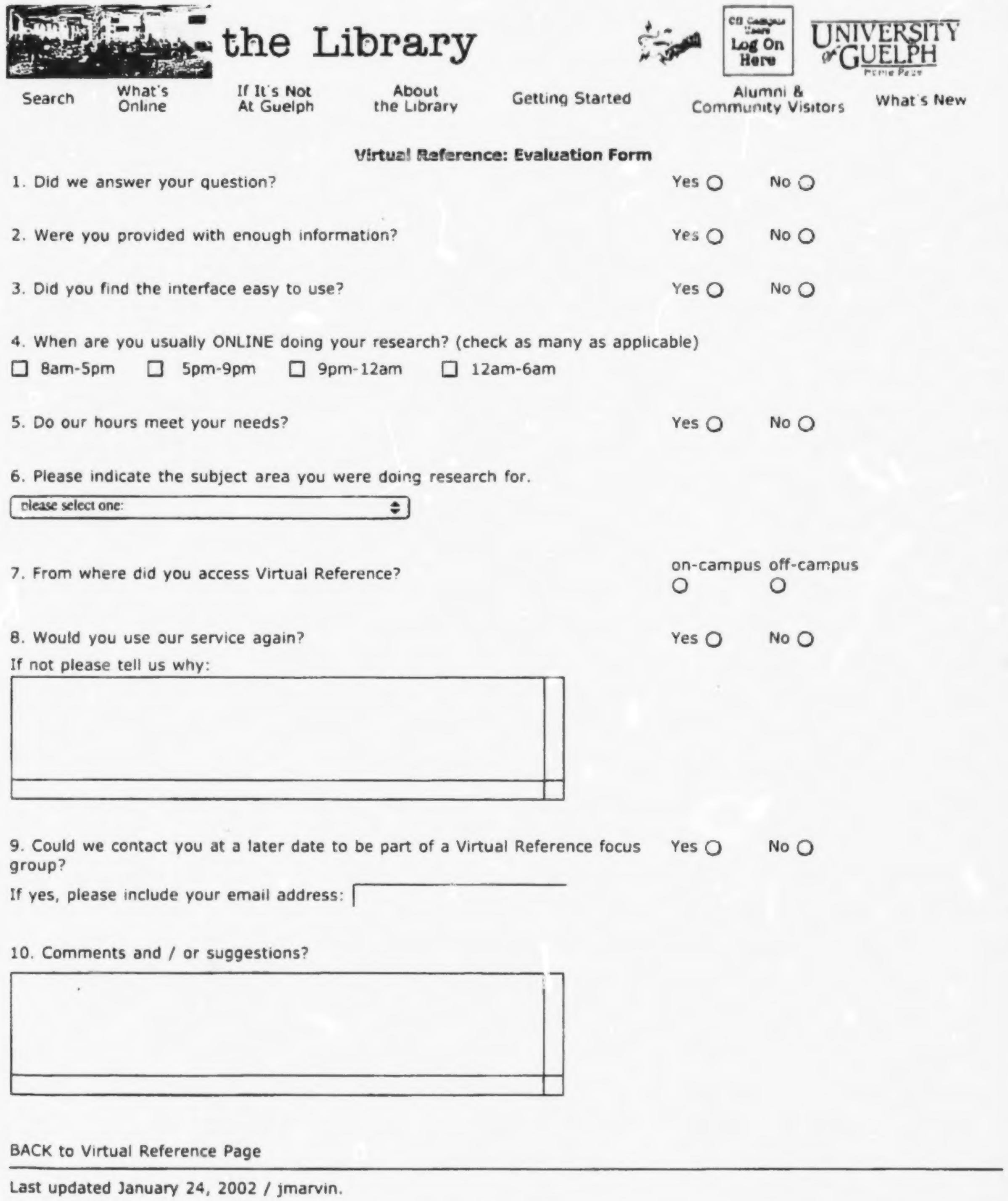
10. Please enter any further comments and suggestions below:

*Thank you for completing our survey. We will use this information to evaluate RefeXpress so that we may provide you with optimal service.

RefeXpress is a library service for the students, faculty and staff of the University of Florida.
Copyright (c) 2000 University of Florida George A. Smathers Libraries. All Rights Reserved.
P. O. Box 117001 Gainesville, FL 32611-7001
Send comments and/or questions about this site to jronan@ufl.edu
Last Updated March 14, 2001.

UNIVERSITY OF GUELPH

http://www.lib.uoguelph.ca/reference/evaluation-form.htm



the Library
Log On Here
UNIVERSITY of GUELPH
Search
What's Online
If It's Not At Guelph
About the Library
Getting Started
Alumni & Community Visitors
What's New

Virtual Reference: Evaluation Form

1. Did we answer your question? Yes ○ No ○

2. Were you provided with enough information? Yes ○ No ○

3. Did you find the interface easy to use? Yes ○ No ○

4. When are you usually ONLINE doing your research? (check as many as applicable)
☐ 8am-5pm ☐ 5pm-9pm ☐ 9pm-12am ☐ 12am-6am

5. Do our hours meet your needs? Yes ○ No ○

6. Please indicate the subject area you were doing research for.
please select one:

7. From where did you access Virtual Reference? on-campus ○ off-campus ○

8. Would you use our service again? Yes ○ No ○
If not please tell us why:

9. Could we contact you at a later date to be part of a Virtual Reference focus group? Yes ○ No ○
If yes, please include your email address:

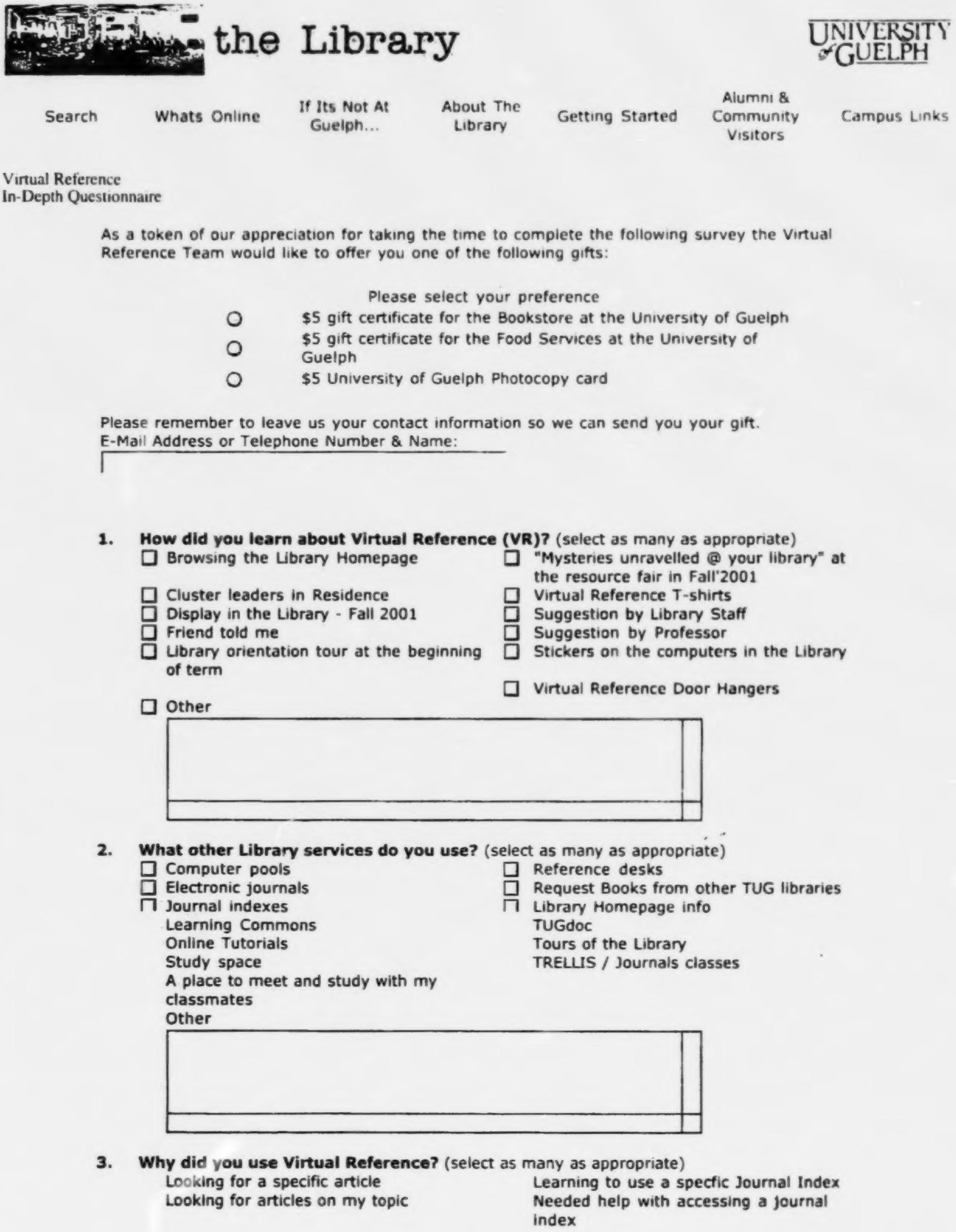
10. Comments and / or suggestions?

BACK to Virtual Reference Page

Last updated January 24, 2002 / jmarvin.

UNIVERSITY OF GUELPH

http://www.lib.uoguelph.ca/reference/evaluation-form.htm



Virtual Reference
In-Depth Questionnaire

As a token of our appreciation for taking the time to complete the following survey the Virtual Reference Team would like to offer you one of the following gifts:

Please select your preference

○ $5 gift certificate for the Bookstore at the University of Guelph
○ $5 gift certificate for the Food Services at the University of Guelph
○ $5 University of Guelph Photocopy card

Please remember to leave us your contact information so we can send you your gift.
E-Mail Address or Telephone Number & Name:

1. **How did you learn about Virtual Reference (VR)?** (select as many as appropriate)
   - ☐ Browsing the Library Homepage
   - ☐ Cluster leaders in Residence
   - ☐ Display in the Library - Fall 2001
   - ☐ Friend told me
   - ☐ Library orientation tour at the beginning of term
   - ☐ Other
   - ☐ "Mysteries unravelled @ your library" at the resource fair in Fall'2001
   - ☐ Virtual Reference T-shirts
   - ☐ Suggestion by Library Staff
   - ☐ Suggestion by Professor
   - ☐ Stickers on the computers in the Library
   - ☐ Virtual Reference Door Hangers

2. **What other Library services do you use?** (select as many as appropriate)
   - ☐ Computer pools
   - ☐ Electronic journals
   - ☐ Journal indexes
   - Learning Commons
   - Online Tutorials
   - Study space
   - A place to meet and study with my classmates
   - Other
   - ☐ Reference desks
   - ☐ Request Books from other TUG libraries
   - ☐ Library Homepage info
   - TUGdoc
   - Tours of the Library
   - TRELLIS / Journals classes

3. **Why did you use Virtual Reference?** (select as many as appropriate)
   - Looking for a specific article
   - Looking for articles on my topic
   - Learning to use a specfic Journal Index
   - Needed help with accessing a journal index

- ☐ Looking for a specific book in TRELLIS
- ☐ Looking for books on my topic
- ☐ General overview of Journal Indexes
- ☐ Needed help with accessing e-journals
- ☐ Needed help with requesting books
- ☐ Needed help with placing a TUGdoc
- ☐ Was not able to access electronic resources (journals or journal indexes)
- ☐ Other

4. **If you were researching an assignment, what type of assignment was it?**
   - ○ Essay
   - ○ Class requirement to use VR
   - ○ Other
   - ○ Needed a quick answer / fact
   - ○ Follow-up to a previous VR interaction

5. **At what stage in your research did you consult Virtual Reference?**
   - ○ At the very beginning
   - ○ After I had tried everything else but wasn't finding what I needed
   - ○ Other
   - ○ Tried some things on my own but wasn't finding what I needed
   - ○ When I ran into technical difficulties accessing a journal index or electronic journal

6. **How often have you used Virtual Reference?**
   - ○ 1-2 times, and I will use VR again
   - ○ 1-2 times, and as a graduating student I will not use VR again
   - ○ 1-2 times, and I will never use VR again
   - ○ More than 5 times
   - ○ Other
   - ○ 3-4 times, and I will use VR again
   - ○ 3-4 times, and as a graduating student I will not use VR again
   - ○ 3-4 times, and I will never use VR again

7. **Why did you use Virtual Reference as opposed to coming in to the Library or asking at the Reference Desk?** (select as many as appropriate)
   - I live on campus and didn't have time to come into the Library
   - I had time to come into the Library but I prefer Virtual Reference
   - I was in the Library but the line ups at the Reference Desk were too long
   - Other
   - I live off campus and didn't have time to come into the Library
   - I usually do my research from my home computer
   - I live outside the Guelph area

8. **The Virtual Reference session saved me a trip to the Library.**
○ Yes ○ No
○ Can't remember

9. **The Virtual Reference session introduced me to different types of resources of which I was previously unaware.**
○ True ○ Not really
○ Can't remember

10. **My Virtual Reference session taught me skills that I will use for future research.**
○ True, I learned something new that will help me with other research ○ Somewhat accurate. It clarified some questions I had.
○ Didn't learn anything. ○ Can't remember

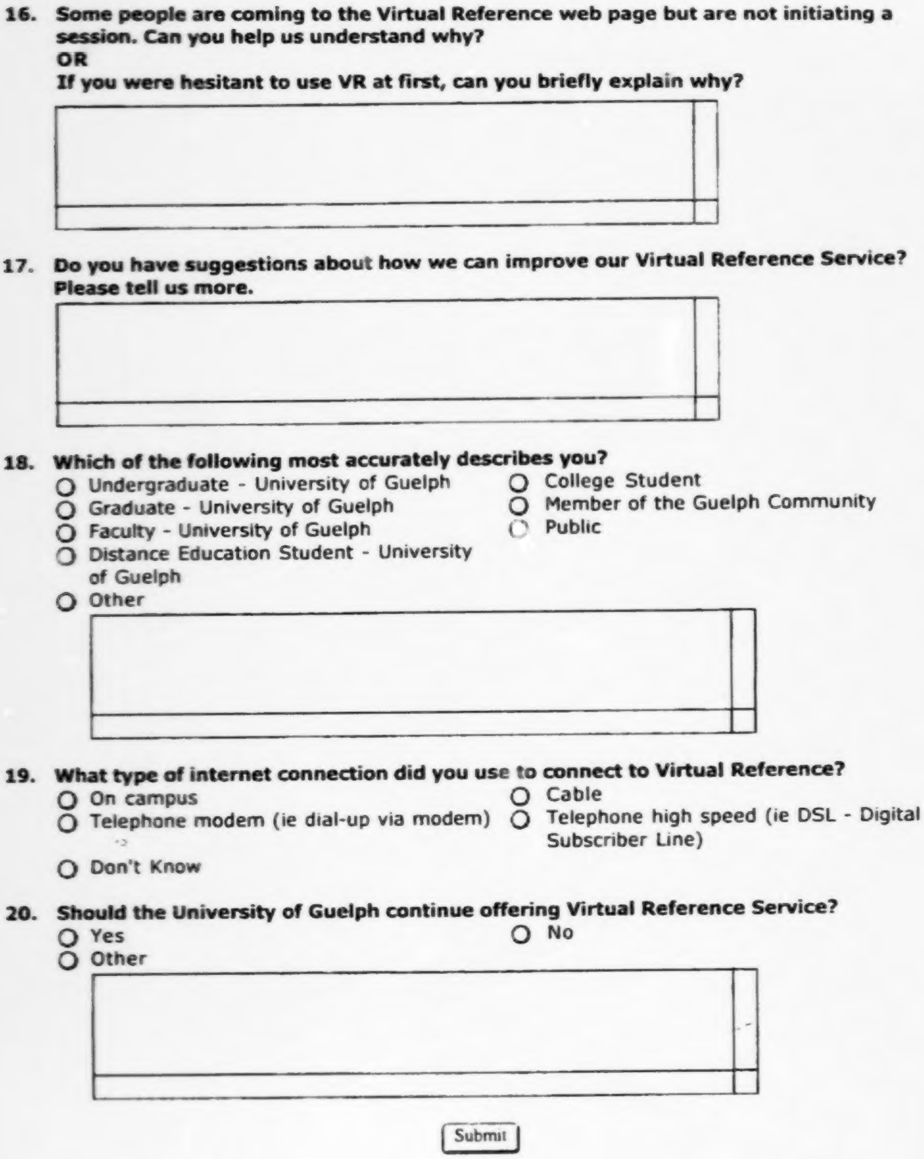
11. **It was important that I received assistance at that particular time, and not wait until I came to the Library.**
○ Very important ○ Somewhat important
○ Time wasn't an issue ○ Can't remember

12. **I found the Virtual Reference experience.**
○ Easy and Quick ○ About Right
○ Easy but Long ○ Confusing and Difficult
○ Interesting, Fun and Quick ○ Confusing, Difficult and Intimidating
○ Interesting, Fun but Long ○ Confusing, Difficult, Intimidating, and Long
Comment

13. **I found the transcript of my Virtual Reference emailed to me was:**
○ Useful ○ Not very useful
○ Don't remember ○ I didn't leave an e-mail address, so I didn't receive a transcript

14. **How valuable was the Virtual Reference Service to you in order to complete your coursework or get the information you needed?**
○ Very valuable ○ Valuable
○ Helped but I could have managed without it ○ Of some assistance
○ No help whatsoever
○ Other

15. **What are the best times for you to use Virtual Reference?**
For example: 10am - 12noon, and then again at 4pm



16. Some people are coming to the Virtual Reference web page but are not initiating a session. Can you help us understand why?
OR
If you were hesitant to use VR at first, can you briefly explain why?

17. Do you have suggestions about how we can improve our Virtual Reference Service? Please tell us more.

18. Which of the following most accurately describes you?

- ○ Undergraduate - University of Guelph
- ○ Graduate - University of Guelph
- ○ Faculty - University of Guelph
- ○ Distance Education Student - University of Guelph
- ○ Other
- ○ College Student
- ○ Member of the Guelph Community
- ○ Public

19. What type of internet connection did you use to connect to Virtual Reference?

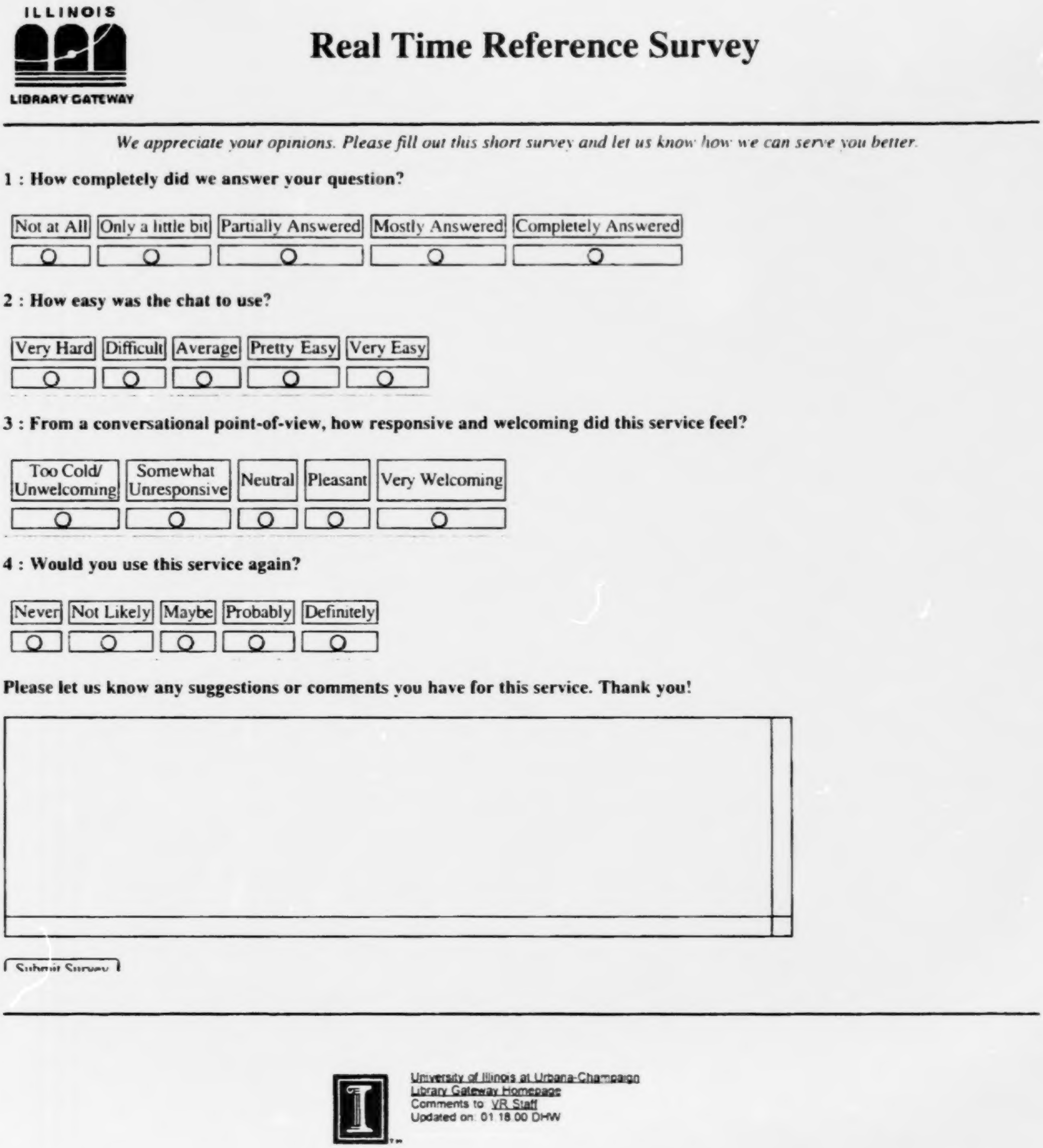
- ○ On campus
- ○ Telephone modem (ie dial-up via modem)
- ○ Don't Know
- ○ Cable
- ○ Telephone high speed (ie DSL - Digital Subscriber Line)

20. Should the University of Guelph continue offering Virtual Reference Service?

- ○ Yes
- ○ Other
- ○ No

UNIVERSITY OF ILLINOIS AT URBANA-CHAMPAIGN

http://www.library.uiuc.edu/ugl/vr/survey.asp



Real Time Reference Survey

We appreciate your opinions. Please fill out this short survey and let us know how we can serve you better.

1 : How completely did we answer your question?

Not at All	Only a little bit	Partially Answered	Mostly Answered	Completely Answered
○	○	○	○	○

2 : How easy was the chat to use?

Very Hard	Difficult	Average	Pretty Easy	Very Easy
○	○	○	○	○

3 : From a conversational point-of-view, how responsive and welcoming did this service feel?

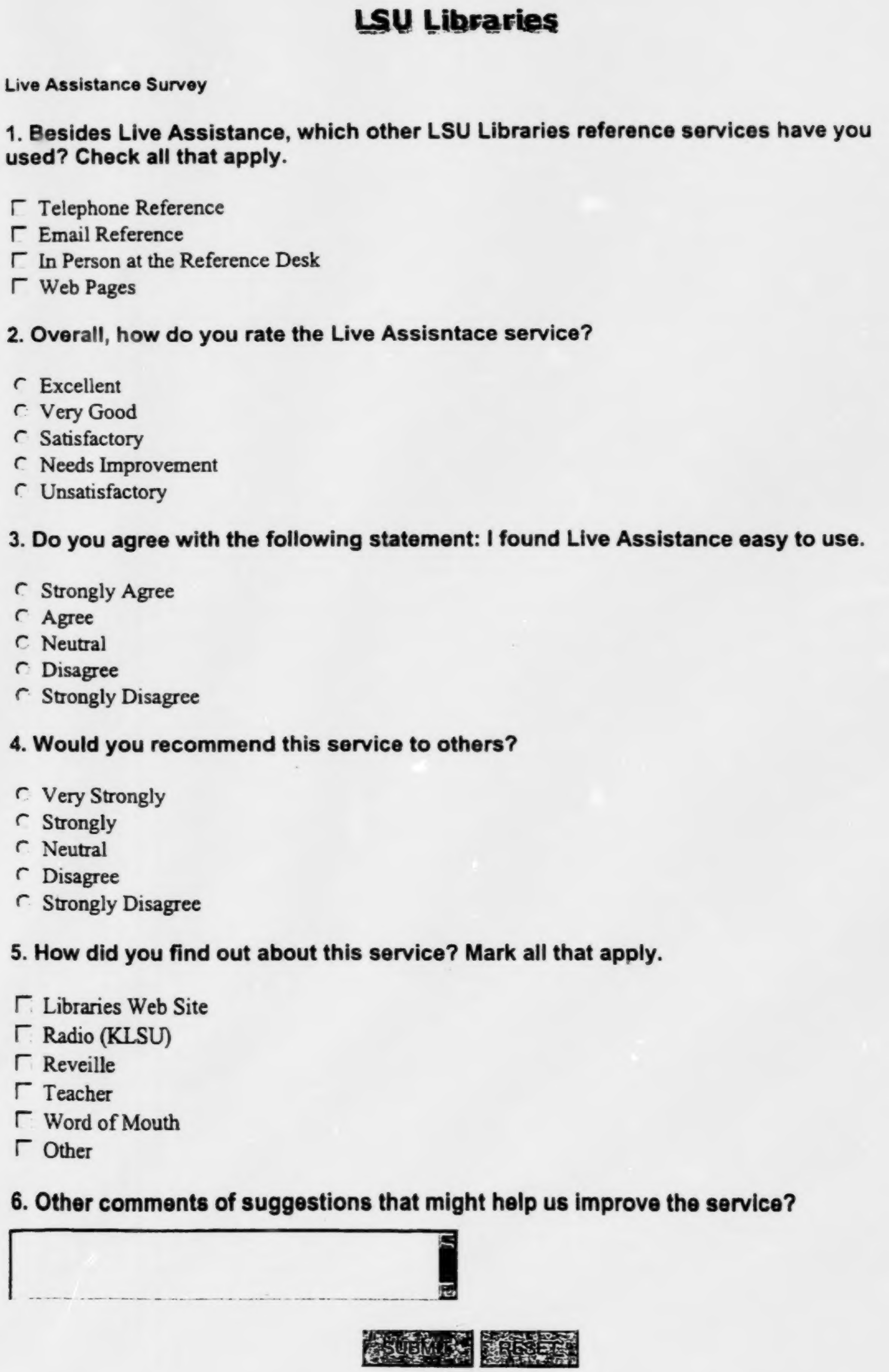
Too Cold/ Unwelcoming	Somewhat Unresponsive	Neutral	Pleasant	Very Welcoming
○	○	○	○	○

4 : Would you use this service again?

Never	Not Likely	Maybe	Probably	Definitely
○	○	○	○	○

Please let us know any suggestions or comments you have for this service. Thank you!

University of Illinois at Urbana-Champaign
Library Gateway Homepage
Comments to: VR Staff
Updated on: 01.18.00 DHW



LSU Libraries

Live Assistance Survey

1. Besides Live Assistance, which other LSU Libraries reference services have you used? Check all that apply.

☐ Telephone Reference
☐ Email Reference
☐ In Person at the Reference Desk
☐ Web Pages

2. Overall, how do you rate the Live Assisntace service?

○ Excellent
○ Very Good
○ Satisfactory
○ Needs Improvement
○ Unsatisfactory

3. Do you agree with the following statement: I found Live Assistance easy to use.

○ Strongly Agree
○ Agree
○ Neutral
○ Disagree
○ Strongly Disagree

4. Would you recommend this service to others?

○ Very Strongly
○ Strongly
○ Neutral
○ Disagree
○ Strongly Disagree

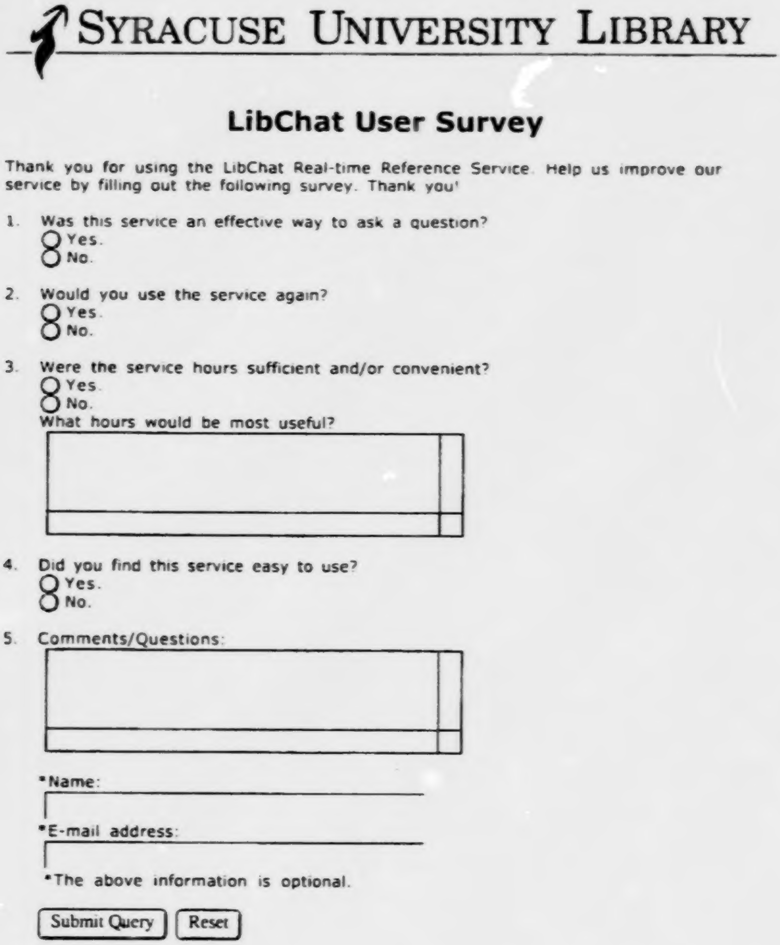
5. How did you find out about this service? Mark all that apply.

☐ Libraries Web Site
☐ Radio (KLSU)
☐ Reveille
☐ Teacher
☐ Word of Mouth
☐ Other

6. Other comments of suggestions that might help us improve the service?

SYRACUSE UNIVERSITY

http://libwww.syr.edu/information/reference/survey/index_eval.html



SYRACUSE UNIVERSITY LIBRARY

LibChat User Survey

Thank you for using the LibChat Real-time Reference Service. Help us improve our service by filling out the following survey. Thank you!

1. Was this service an effective way to ask a question?
   ○ Yes.
   ○ No.
2. Would you use the service again?
   ○ Yes.
   ○ No.
3. Were the service hours sufficient and/or convenient?
   ○ Yes.
   ○ No.
   What hours would be most useful?
4. Did you find this service easy to use?
   ○ Yes.
   ○ No.
5. Comments/Questions:

*Name:

*E-mail address:

*The above information is optional.

http://tel.library.yorku.ca/survey.asp

York University Online Reference User Survey

You recently sent us a question using our **Librarians Online** chat reference service. To assist us in making improvements in this service, we would like some feedback from you and would appreciate it if you would take just a few minutes to answer the questions below.

Participation in this survey is voluntary and all information will be kept anonymous and confidential.

Thank you for your time and cooperation.

Librarians Online Team

Please check your status:

- ● Undergraduate student
- ○ Graduate student
- ○ Atkinson student
- ○ Faculty
- ○ Staff
- ○ Not affiliated with York University
- ○ Other

Where did you access the chat reference service?

- ● In library
- ○ On campus
- ○ Off campus

When do you tend to do online research? Check all that apply.

- ☐ 7am - noon
- ☐ Noon - 5pm
- ☐ 5pm - 9pm
- ☐ 9pm - midnight
- ☐ Midnight - 7am

How well did we answer your question or lead you to the answer?

- ● 1 **Not well**
- ○ 2
- ○ 3
- ○ 4
- ○ 5 **Very well**

How easy did you find it to use the chat software?

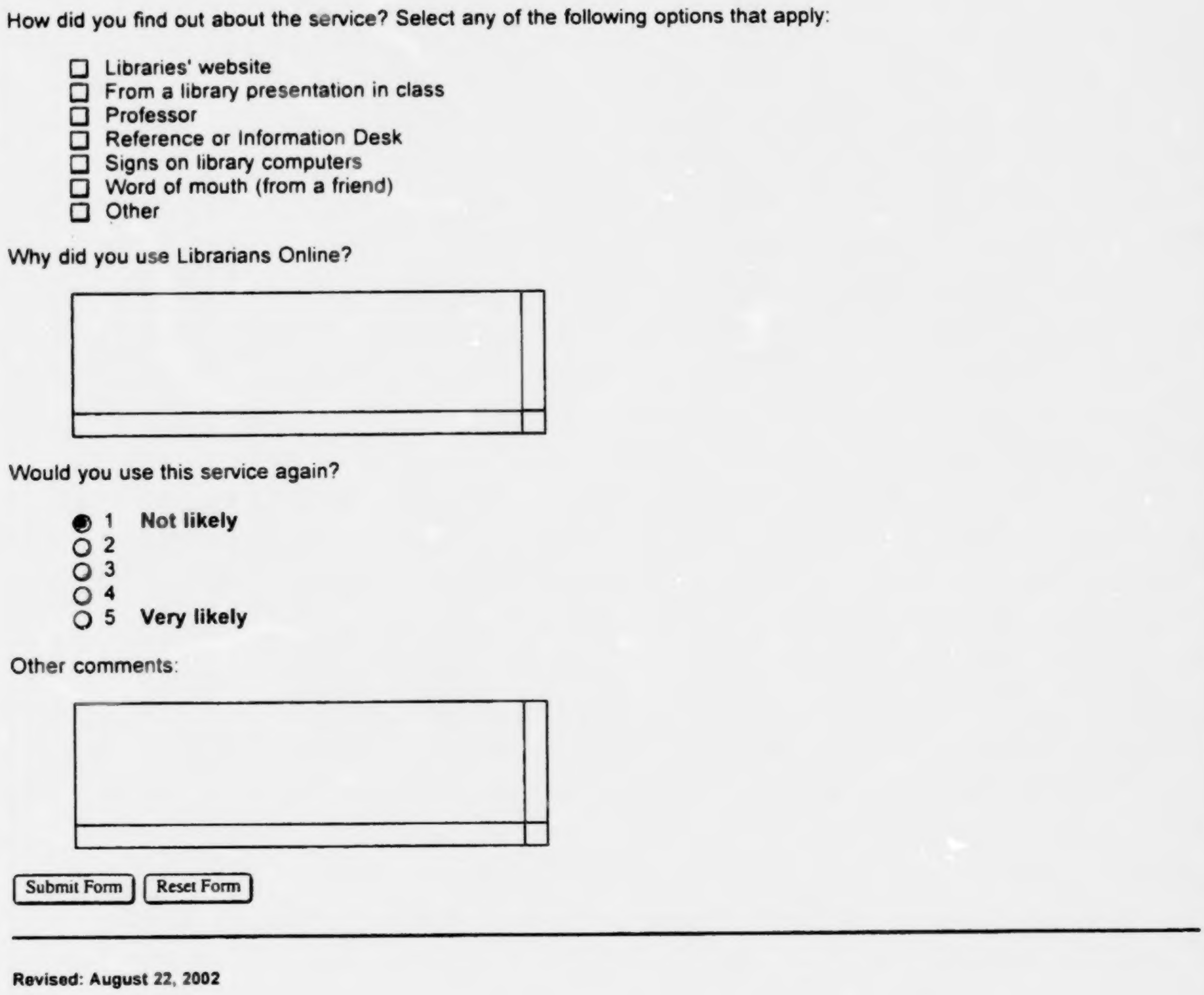
1 **Not easy**
2
3
4
5 **Very easy**

How would you rate your overall satisfaction with the service?

1 **Not satisfied**
2
3
4
5 **Very satisfied**

YORK UNIVERSITY

http://tel.library.yorku.ca/survey.asp



How did you find out about the service? Select any of the following options that apply:

☐ Libraries' website
☐ From a library presentation in class
☐ Professor
☐ Reference or Information Desk
☐ Signs on library computers
☐ Word of mouth (from a friend)
☐ Other

Why did you use Librarians Online?

Would you use this service again?

● 1 **Not likely**
○ 2
○ 3
○ 4
○ 5 **Very likely**

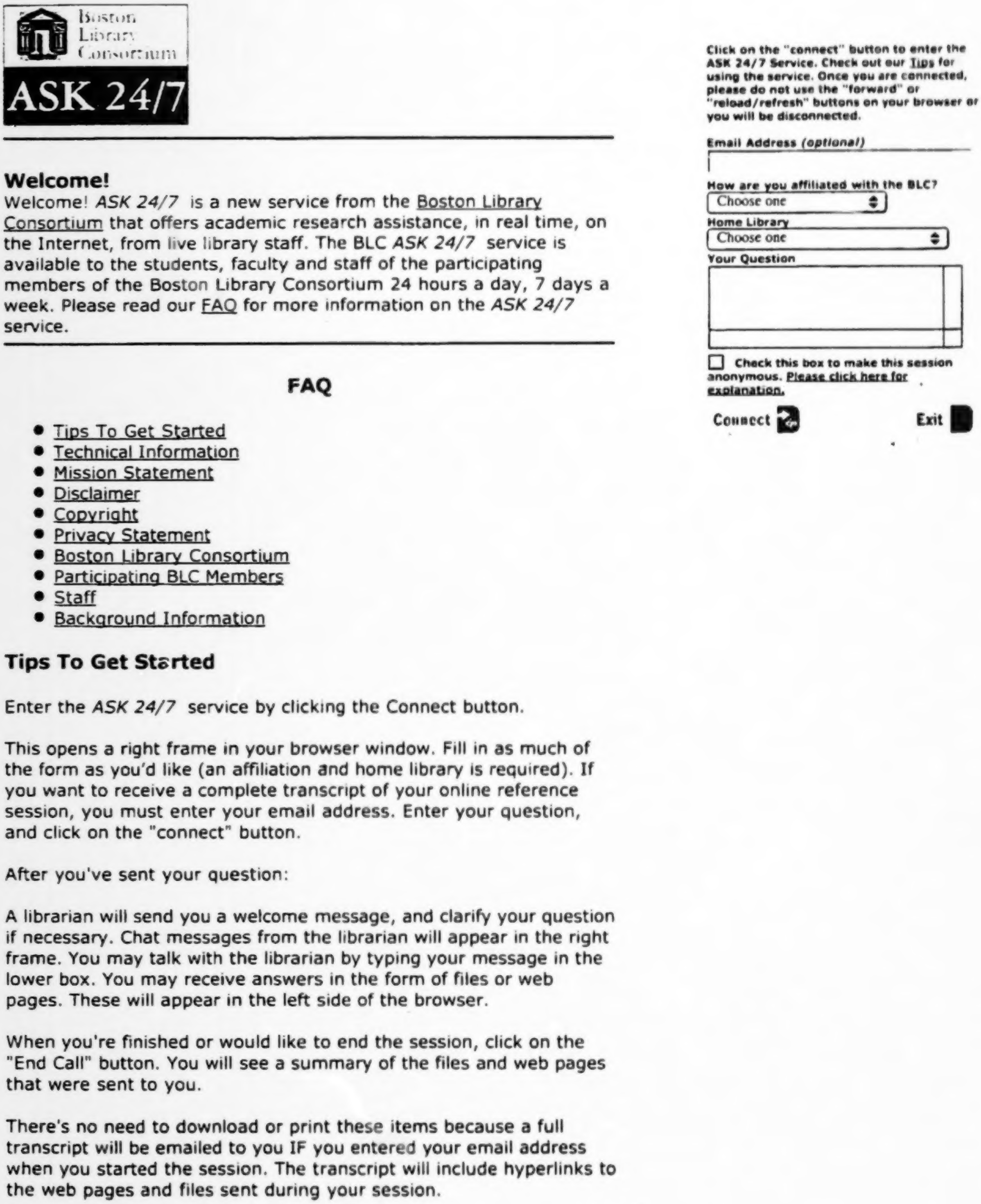
Other comments:

Revised: August 22, 2002

Collaborative Projects

Boston Library Consortium

http://www.247ref.org/portal/blc/blcviewport.html



Boston Library Consortium

ASK 24/7

Welcome!

Welcome! *ASK 24/7* is a new service from the Boston Library Consortium that offers academic research assistance, in real time, on the Internet, from live library staff. The BLC *ASK 24/7* service is available to the students, faculty and staff of the participating members of the Boston Library Consortium 24 hours a day, 7 days a week. Please read our FAQ for more information on the *ASK 24/7* service.

Click on the "connect" button to enter the ASK 24/7 Service. Check out our Tips for using the service. Once you are connected, please do not use the "forward" or "reload/refresh" buttons on your browser or you will be disconnected.

Email Address ***(optional)***

How are you affiliated with the BLC?
Choose one

Home Library
Choose one

Your Question

☐ **Check this box to make this session anonymous. Please click here for explanation.**

FAQ

- Tips To Get Started
- Technical Information
- Mission Statement
- Disclaimer
- Copyright
- Privacy Statement
- Boston Library Consortium
- Participating BLC Members
- Staff
- Background Information

Tips To Get Started

Enter the *ASK 24/7* service by clicking the Connect button.

This opens a right frame in your browser window. Fill in as much of the form as you'd like (an affiliation and home library is required). If you want to receive a complete transcript of your online reference session, you must enter your email address. Enter your question, and click on the "connect" button.

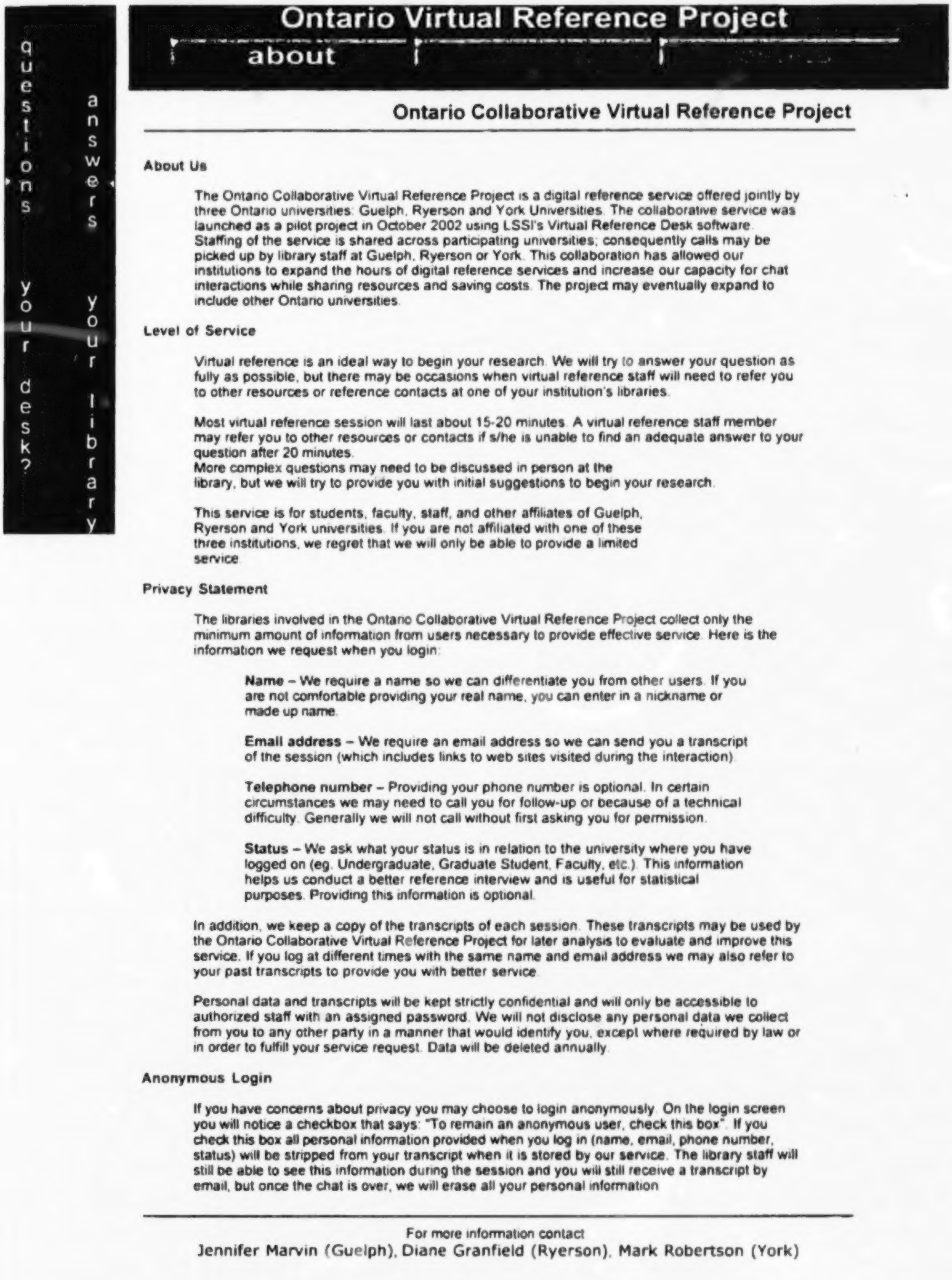
After you've sent your question:

A librarian will send you a welcome message, and clarify your question if necessary. Chat messages from the librarian will appear in the right frame. You may talk with the librarian by typing your message in the lower box. You may receive answers in the form of files or web pages. These will appear in the left side of the browser.

When you're finished or would like to end the session, click on the "End Call" button. You will see a summary of the files and web pages that were sent to you.

There's no need to download or print these items because a full transcript will be emailed to you IF you entered your email address when you started the session. The transcript will include hyperlinks to the web pages and files sent during your session.

http://alpha.lib.uoguelph.ca/reference/OCUL/about.html



Ontario Collaborative Virtual Reference Project

About Us

The Ontario Collaborative Virtual Reference Project is a digital reference service offered jointly by three Ontario universities: Guelph, Ryerson and York Universities. The collaborative service was launched as a pilot project in October 2002 using LSSI's Virtual Reference Desk software. Staffing of the service is shared across participating universities; consequently calls may be picked up by library staff at Guelph, Ryerson or York. This collaboration has allowed our institutions to expand the hours of digital reference services and increase our capacity for chat interactions while sharing resources and saving costs. The project may eventually expand to include other Ontario universities.

Level of Service

Virtual reference is an ideal way to begin your research. We will try to answer your question as fully as possible, but there may be occasions when virtual reference staff will need to refer you to other resources or reference contacts at one of your institution's libraries.

Most virtual reference session will last about 15-20 minutes. A virtual reference staff member may refer you to other resources or contacts if s/he is unable to find an adequate answer to your question after 20 minutes.
More complex questions may need to be discussed in person at the library, but we will try to provide you with initial suggestions to begin your research.

This service is for students, faculty, staff, and other affiliates of Guelph, Ryerson and York universities. If you are not affiliated with one of these three institutions, we regret that we will only be able to provide a limited service.

Privacy Statement

The libraries involved in the Ontario Collaborative Virtual Reference Project collect only the minimum amount of information from users necessary to provide effective service. Here is the information we request when you login:

Name – We require a name so we can differentiate you from other users. If you are not comfortable providing your real name, you can enter in a nickname or made up name.

Email address – We require an email address so we can send you a transcript of the session (which includes links to web sites visited during the interaction).

Telephone number – Providing your phone number is optional. In certain circumstances we may need to call you for follow-up or because of a technical difficulty. Generally we will not call without first asking you for permission.

Status – We ask what your status is in relation to the university where you have logged on (eg. Undergraduate, Graduate Student, Faculty, etc.). This information helps us conduct a better reference interview and is useful for statistical purposes. Providing this information is optional.

In addition, we keep a copy of the transcripts of each session. These transcripts may be used by the Ontario Collaborative Virtual Reference Project for later analysis to evaluate and improve this service. If you log at different times with the same name and email address we may also refer to your past transcripts to provide you with better service.

Personal data and transcripts will be kept strictly confidential and will only be accessible to authorized staff with an assigned password. We will not disclose any personal data we collect from you to any other party in a manner that would identify you, except where required by law or in order to fulfill your service request. Data will be deleted annually.

Anonymous Login

If you have concerns about privacy you may choose to login anonymously. On the login screen you will notice a checkbox that says: "To remain an anonymous user, check this box". If you check this box all personal information provided when you log in (name, email, phone number, status) will be stripped from your transcript when it is stored by our service. The library staff will still be able to see this information during the session and you will still receive a transcript by email, but once the chat is over, we will erase all your personal information

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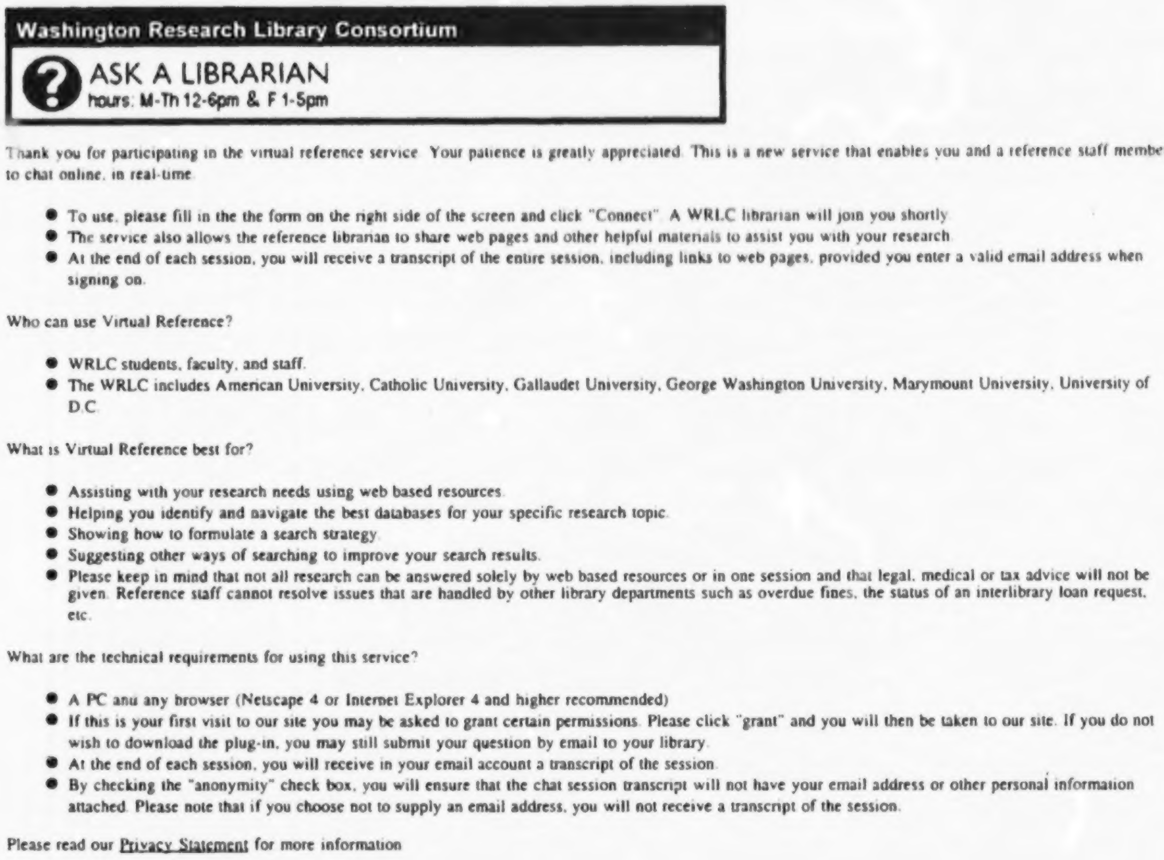
For more information contact
Jennifer Marvin (Guelph), Diane Granfield (Ryerson), Mark Robertson (York)

WASHINGTON RESEARCH LIBRARY CONSORTIUM

http://www.wrlc.org/virtualref/virtualref.html



Washington Research Library Consortium

ASK A LIBRARIAN
hours: M-Th 12-6pm & F 1-5pm

Thank you for participating in the virtual reference service. Your patience is greatly appreciated. This is a new service that enables you and a reference staff member to chat online, in real-time.

- To use, please fill in the the form on the right side of the screen and click "Connect". A WRLC librarian will join you shortly.
- The service also allows the reference librarian to share web pages and other helpful materials to assist you with your research.
- At the end of each session, you will receive a transcript of the entire session, including links to web pages, provided you enter a valid email address when signing on.

Who can use Virtual Reference?

- WRLC students, faculty, and staff.
- The WRLC includes American University, Catholic University, Gallaudet University, George Washington University, Marymount University, University of D.C.

What is Virtual Reference best for?

- Assisting with your research needs using web based resources.
- Helping you identify and navigate the best databases for your specific research topic.
- Showing how to formulate a search strategy.
- Suggesting other ways of searching to improve your search results.
- Please keep in mind that not all research can be answered solely by web based resources or in one session and that legal, medical or tax advice will not be given. Reference staff cannot resolve issues that are handled by other library departments such as overdue fines, the status of an interlibrary loan request, etc.

What are the technical requirements for using this service?

- A PC and any browser (Netscape 4 or Internet Explorer 4 and higher recommended)
- If this is your first visit to our site you may be asked to grant certain permissions. Please click "grant" and you will then be taken to our site. If you do not wish to download the plug-in, you may still submit your question by email to your library.
- At the end of each session, you will receive in your email account a transcript of the session.
- By checking the "anonymity" check box, you will ensure that the chat session transcript will not have your email address or other personal information attached. Please note that if you choose not to supply an email address, you will not receive a transcript of the session.

Please read our Privacy Statement for more information.

SELECTED RESOURCES

BEST COPY AVAILABLE

Books and Articles

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Note: All Web sites accessed December 12, 2002.

SPEC KIT ORDER FORM

QTY TITLE

____ SP273 Chat Reference
____ SP272 Insuring & Valuing Res Lib Coll
____ SP271 Lib Systems Office Organization
____ SP270 Core Competencies
____ SP269 Integrating Preservation Activities
____ SP268 Reference Statistics
____ SP267 User Authentication
____ SP266 Staffing the Library Website
____ SP265 Instructional Support Services
____ SP264 Extended Library Hours
____ SP263 Numeric Data Services
____ SP262 Preservation & Digitization
____ SP261 Post-Tenure Review
____ SP260 Interview Process
____ SP259 Fee-based Services
____ SP258 Corporate Annual Reports
____ SP257 MLS Hiring Requirement
____ SP256 Changing Roles of Lib Profs
____ SP255 Branch Libs/Discrete Collectns
____ SP254 Managing Printing Services
____ SP253 Networked Info Services
____ SP252 Supprt Staff Classifictn Studies
____ SP251 Electronic Reference Service
____ SP250 TL10: Educating Faculty
____ SP249 Catalogng of Resrces Digitized
____ SP248 Licensing of Electronic Prodcts
____ SP247 Management of Lib Security
____ SP246 Web Page Devel & Managmnt
____ SP245 Electronic Reserves Operations
____ SP244 TL 9: Renovation & Reconfigur.
____ SP243 TL 8: Users with Disabilities
____ SP242 Library Storage Facilities
____ SP241 Gifts and Exchange Function
____ SP240 Marketing and PR Activities
____ SP239 Mentoring Programs in ARL
____ SP238 ARL GIS Literacy Project
____ SP237 Managing Food and Drink
____ SP236 TL 7: E-Theses/Dissertations
____ SP235 Collaborative Coll Management
____ SP234 TL 6: Distance Learning
____ SP233 ARL in Extension/Outreach
____ SP232 Use of Teams in ARL
____ SP231 Cust Service Programs in ARL
____ SP230 Affirmative Action in ARL
____ SP229 Evaluating Acad Libr Dirs
____ SP228 TL 5: Preserving Digital Info
____ SP227 Org of Doc Coll & Svcs
____ SP226 TL 4: After the User Survey
____ SP225 Partnerships Program
____ SP224 Staff Training & Development
____ SP223 TL 3: Electronic Scholarly Pubn
____ SP222 Electronic Resource Sharing

QTY TITLE

____ SP221 Evol & Status of Approval Plans
____ SP220 Internet Training
____ SP219 TL 2: Geographic Info Systems
____ SP218 Info Technology Policies
____ SP217 TL 1: Electronic Reserves
____ SP216 Role of Libs in Distance Ed
____ SP215 Reorg & Restructuring
____ SP214 Digit Tech for Preservation
____ SP213 Tech Svcs Workstations
____ SP212 Non-Librarian Professionals
____ SP211 Library Systems Office Org
____ SP210 Strategic Planning
____ SP209 Library Photocopy Operations
____ SP208 Effective Library Signage
____ SP207 Org of Collection Develop
____ SP206 Faculty Organizations
____ SP205 User Surveys in ARL Libs
____ SP204 Uses of Doc Delivery Svcs
____ SP203 Reference Svc Policies
____ SP202 E-journals/Issues & Trends
____ SP201 E-journals/Pol & Proced
____ SP200 2001: A Space Reality
____ SP199 Video Collect & Multimedia
____ SP198 Automating Preserv Mgt
____ SP197 Benefits/Professional Staff
____ SP196 Quality Improve Programs
____ SP195 Co-op Strategies in Foreign Acqs
____ SP194 Librarian Job Descriptions
____ SP193 Lib Develop & Fundraising
____ SP192 Unpub Matls/Libs, Fair Use
____ SP191 Prov Pub Svcs Remote User
____ SP190 Chang Role of Book Repair
____ SP189 Liaison Svcs in ARL Libs
____ SP188 Intern, Residency & Fellow
____ SP187 ILL Trends/Staff & Organ
____ SP186 Virtual Library
____ SP185 System Migration
____ SP184 ILL Trends/Access
____ SP183 Provision of Comp Print Cap
____ SP182 Academic Status for Libns
____ SP181 Perf Appr of Collect Dev Libn
____ SP180 Flexible Work Arrangemts
____ SP179 Access Services Org & Mgt
____ SP178 Insuring Lib Colls & Bldgs
____ SP177 Salary Setting Policies
____ SP176 Svcs for Persons w/Disabilities
____ SP175 Scholarly Info Centrs
____ SP174 Expert Systems
____ SP173 Staff Recognition Awards
____ SP172 Information Desks
____ SP171 Training of Tech Svc Staff
____ SP170 Organization Charts
____ SP169 Mgt of CD-ROM
____ SP168 Student Employment
____ SP167 Minority Recruitment
____ SP166 Materials Budgets
____ SP165 Cultural Diversity
____ SP164 Remote Storage
____ SP163 Affirmative Action
____ SP162 Audiovisual Policies

QTY TITLE

____ SP161 Travel Policies
____ SP160 Preservation Org & Staff
____ SP159 Admin of Lib Computer Files
____ SP158 Strategic Plans
____ SP157 Fee-based Services
____ SP156 Automating Authority Control
____ SP155 Visiting Scholars/Access
____ SP154 Online Biblio Search
____ SP153 Use of Mgt Statistics
____ SP152 Brittle Books Program
____ SP151 Qualitative Collect Analysis
____ SP150 Bldg Security & Personal Safety
____ SP149 Electronic Mail
____ SP148 User Surveys
____ SP147 Serials Control/Deselection
____ SP146 Lib Dev Fund Raising Capabilit
____ SP145 Lib Publications Programs
____ SP144 Building Use Policies
____ SP143 Search Proced Sr LibAdmin
____ SP142 Remote Access Online Cats
____ SP141 Approval Plans
____ SP140 Performance Appraisal
____ SP139 Performance Eval: Ref Svcs
____ SP138 University Copyright
____ SP137 Preservation Guidelines
____ SP136 Managing Copy Cataloging
____ SP135 Job Analysis
____ SP134 Planning Mgt Statistics
____ SP133 Opt Disks: Storage & Access
____ SP132 Library-Scholar Communication
____ SP131 Coll Dev Organization
____ SP130 Retrospective Conversion
____ SP129 Organization Charts
____ SP128 Systems File Organization
____ SP127 Interlibrary Loan
____ SP126 Automated Lib Systems
____ SP125 Tech Svcs Cost Studies
____ SP124 Barcoding of Collections
____ SP123 Microcomp Software Policies
____ SP122 End-User Search Svcs
____ SP121 Bibliographic Instruction
____ SP120 Exhibits
____ SP119 Catalog Maintenance Online
____ SP118 Unionization
____ SP117 Gifts & Exchange Function
____ SP116 Organizing for Preservation
____ SP115 Photocopy Services
____ SP114 Binding Operations
____ SP113 Preservation Education
____ SP112 Reorg of Tech and Pub Svcs
____ SP111 Cooperative Collection Dev
____ SP110 Local Cataloging Policies
____ SP109 Staff Training for Automation
____ SP108 Strategic Planning
____ SP107 University Archives
____ SP106 Electronic Mail
____ SP105 Nonbibliographic Dbases
____ SP104 Microcomputers
____ SP103 Asst/Assoc Dir Position
____ SP102 Copyright Policies

QTY	TITLE
____	SP101 User Studies
____	SP100 Collection Security
____	SP099 Branch Libraries
____	SP098 Telecommunications
____	SP097 Building Renovation
____	SP096 Online Catalogs
____	SP095 Lib Materials Cost Studies
____	SP094 Fund Raising
____	SP093 User Instructions for Online Cats
____	SP092 Interlibrary Loan
____	SP091 Student Assistants
____	SP090 Integrated Lib Info Systems
____	SP089 Tech Svcs Cost Studies
____	SP088 Corporate Use of Research Libs
____	SP087 Collect Descript/Assessment
____	SP086 Professional Development
____	SP085 Personnel Classification Sys
____	SP084 Public Svcs Goals & Objectvs
____	SP083 Approval Plans
____	SP082 Document Delivery Systems
____	SP081 Services to the Disabled
____	SP080 Specialty Positions
____	SP079 Internships/Job Exchanges
____	SP078 Recruitment-Selection
____	SP077 Use of Small Computers
____	SP076 Online Biblio Search Svcs
____	SP075 Staff Development
____	SP074 Fees for Services
____	SP073 External User Services
____	SP072 Executive Review
____	SP071 User Surveys: Eval of Lib Svcs
____	SP070 Preservation Procedures
____	SP069 Prep Emergencies/Disasters
____	SP068 AACR2 Implement Studies

QTY	TITLE
____	SP067 Affirm Action Programs
____	SP066 Planning Preserv of Lib Materials
____	SP065 Retrospective Conversion
____	SP064 Indirect Cost Rates
____	SP063 Collective Bargaining
____	SP062 Online Biblio Search Svcs
____	SP061 Status of Librarians
____	SP060 Lib Materials Cost Studies
____	SP059 Microform Collections
____	SP058 Goals & Objectives
____	SP057 Special Collections
____	SP056 External Communication
____	SP055 Internl Com/Staff & Superv Role
____	SP054 Internal Com/Policies & Proced
____	SP053 Performance Appraisal
____	SP052 Cost Studies & Fiscal Plan
____	SP051 Professional Development
____	SP050 Fringe Benefits
____	SP049 Use of Annual Reports
____	SP048 External Fund Raising
____	SP047 Automated Cataloging
____	SP046 Plan Future of Card Catalog
____	SP045 Changing Role Personnel Officer
____	SP044 Automated Acquisitions
____	SP043 Automated Circulation Sys
____	SP042 Resource Sharing
____	SP041 Collection Assessment
____	SP040 Skills Training
____	SP039 Remote Storage
____	SP038 Collection Dev Policies
____	SP037 Theft Detection & Prevent
____	SP036 Allocation Materials Funds
____	SP035 Preservation of Lib Materials
____	SP034 Determin Indirect Cost Rate

QTY	TITLE
____	SP033 Intergrat Nonprint Media
____	SP032 Prep, Present Lib Budget
____	SP031 Allocation of Resources
____	SP030 Support Staff, Student Assts
____	SP029 Systems Function
____	SP028 Gifts & Exchange Function
____	SP027 Physical Access
____	SP026 Bibliographic Access
____	SP025 User Statistics and Studies
____	SP024 User Surveys
____	SP023 Grievance Policies
____	SP022 Private Foundations
____	SP021 Paraprofessionals
____	SP020 Managerial Technical Specialists
____	SP019 Staff Allocations
____	SP018 Staff Development
____	SP017 Library Instruction
____	SP016 Reclassification
____	SP015 Goals & Objectives
____	SP014 Performance Review
____	SP013 Planning Systems
____	SP012 Acquisition Policies
____	SP011 Collection Development
____	SP010 Leave Policies
____	SP009 Tenure Policies
____	SP008 Collective Bargaining
____	SP007 Personnel Class Schemes
____	SP006 Friends of the Lib Organization
____	SP005 Performance Review
____	SP004 Affirmative Action
____	SP003 A Personnel Organization
____	SP003 Status of Librarians
____	SP002 Personnel Survey (flyer only)
____	SP001 Organization Charts

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